

Filling out the Transfer Inventory Worksheet - Maryland State Archives

Each field in the header section (seen below) in the Worksheet must be filled out.

Maryland State Archives Transfer Inventory Worksheet

Series Information	
Date:	<i>(date form is filled out)</i>
Agency:	<i>(e.g. Baltimore City Circuit Court)</i>
Series Name:	<i>(e.g. civil papers)</i>
Series T Number:	<i>(e.g. T2691 - may be left blank if unknown)</i>
Retention Schedule:	<i>(Provide schedule & item number citation for these records)</i>
Restriction Citation:	<i>(e.g. Maryland Annotated Code General Provisions § 4-329. Or if there is none, type in NONE.)</i>
Container Type:	<i>(e.g. Record Center Box, Clamshell Box, Volume/Book)</i>
Series Description/ Purpose of the record:	<i>(e.g. Meeting minute books documenting background of decisions made by County Council.)</i>
How is the series organized?	<i>(e.g. alphabetical by year)</i>
Is there an index?	<i>(Enter Yes or No)</i>

Has the record ever been exposed to:	
Water?	<i>(Enter Yes or No)</i>
Damp/Mildew?	<i>(Enter Yes or No)</i>
Fire/Smoke?	<i>(Enter Yes or No)</i>
Insects/Rodents?	<i>(Enter Yes or No)</i>
Other Issue?	<i>(Enter Yes or No)</i>
If you answered yes, explain how the issue was resolved:	

Are the records damaged:	
Dirty/contains residue?	<i>(Enter Yes or No)</i>
Torn/Brittle?	<i>(Enter Yes or No)</i>
Creased/Folded?	<i>(Enter Yes or No)</i>
Stained/discolored?	<i>(Enter Yes or No)</i>
Contain odor?	<i>(Enter Yes or No)</i>
Insect damage/remains?	<i>(Enter Yes or No)</i>
Water damage/mildew?	<i>(Enter Yes or No)</i>

Below you will find more info about how to fill out each.

- **Date-** is for the date when you are completing the worksheet. This date field is particularly important if you submit an inventory and then want to update it. If you want to update an inventory you already sent us, make sure the new inventory has the new date on it and that it is the complete inventory, so that we can use it to replace the formerly submitted inventory.
- **Agency-** is the agency transferring these records. Include the specific division, office, or department.
- **Series Name-** Here we are looking for the official name of the type of record as it is listed on the retention schedule, such as Books of Final Entry or Adoption Case File.
- **Series T Number-** This is so that when you transfer records to us we can associate them with previous transfers of that same type of record. The T number is available in our [Guide to Government Records](#) and the receipt that you get after each transfer.
- **Retention Schedule Citation-** This is to identify what the records are. Include the entire citation, including schedule, section and item numbers.

- **Restriction Citation-** The Archives will abide by any legal restrictions to providing access to the records, but we must know what these restrictions are. You are required to give us a citation of the law or regulation.
 - **If there is no restriction**, please put “none,” so we know you didn’t just forget to enter it. However, you can’t restrict a record with general terms such as saying “restricted” or “personal”.
 - Here is an example of an acceptable restriction: Annotated Code of MD, State Government Article 2-207
- **Container Type-** This tells us what the records are stored in, acceptable examples would be: Record Center Box, Clamshell Box
 - Volumes or Books do not need to be boxed, so it is acceptable to say, “Volumes not boxed”.
- **Series Description/ Purpose of the record-** Tell us some background information about this type of record. What makes it warrant a permanent retention? Why is it important? What information does it hold that makes it important?
- **How is the series organized?-** Are the files or books arranged chronologically? By Name? By a certain party, such as Grantor or Grantee?
- **Is there an index?-** How do you access the information within these files? Do you have to use another source to help find something within these files?
- The Archives asks that the questions here are answered honestly and to the best of your agency’s knowledge of the history of the records. **Please respond Yes or No to the following questions:**
 - Has the record ever been exposed to Water? Damp Conditions/Mold? Fire/Smoke? Insects/Rodents? Other Issue?
 - **If you answered yes to any, explain how the issue was resolved:** For example, what action was taken to take care of this situation? Was an exterminator called in? Were wet records thoroughly dried?
 - **NOTE:** for some instances documentation of a resolution may be requested before a transfer can occur.
- The Archives asks that the questions here are answered honestly and to the best of your agency’s knowledge of the current condition of the records. **Please respond Yes or No to the following questions:**
 - Do the records show damage in any of the following ways: Torn/Brittle? Creased/Folded? Stained/discolored? Dirty/contains residue? Contain odor? Water damage/mildew? Insect damage/remains?

In the body of the worksheet (seen below), you will list specifics about this particular transfer.

Detailed Inventory			
NOTE: Please use as many lines below as needed. Different series will need a separate spreadsheet.			
Box Number (If Volume/Book, leave blank)	Title as found on volume/book or brief description of contents of box	Dates Covered by Contents	Miscellaneous Notes

Below, you will find more information about how to fill out each column.

- **Box Number-** only use this column if your files are in boxes. Each box should be listed on a separate line. This helps the Archives staff match what is listed on the inventory with the box itself.
- **Title as found on the Volume/Book or a brief description of the contents of box-** this is what we use to identify the correct box or book for any given item, so make sure it is sufficiently detailed.
 - **If it's a volume or book:** This is where you would list The book name and number should be listed in the description column. This may include a number (Book 54) or Initials & a number (MLP 34). Sometimes it may not have a title other than what it is, such as, "Tax Book". (This is why it is also important to include dates for each book.)
 - **If it's a box of files:** For example, with case numbers, specify which numbers are not included if not all cases in a certain range are in the box. For example:
 - 1-100 (all inclusive)
 - 1-100 (not included 10, 52, 78-80, 95)
 - 1-9, 11-51, 53-77, 81-94, 96-100
- **Dates Covered By The Contents-** This is also information we need to find any particular item. There should be a date or range of dates provided for each volume/book or box. This can be as specific as you see fit.
 - Below is the acceptable standard formatting for dates.
 - Option 1: YYYY
 - Option 2: YYYY-YYYY
 - Option 3: MM/YYYY

- Option 4: MM/YYYY-MM/YYYY
- Option 5: MM/DD/YYYY
- Option 6: MM/DD/YYYY-MM/DD/YYYY
- “No Date” or a blank field will not be accepted
- **Miscellaneous Notes-** This is for anything you think we might need to know. If you know we are going to have a question, go ahead and answer it ahead of time in this field.
 - Examples of the kind of information that might go here is letting us know that this is the end of the series and this type of record is not created anymore, or that there is a date gap, or perhaps a change to the format (microfilm to digital image).
 - You can also include notes here to help us understand how the records might relate or overlap with other series.
- Here are examples of well-completed inventories.
 - [Sample book inventory 1](#)
 - [Sample book inventory 2](#)
 - [Sample box inventory 1](#)
 - [Sample box inventory 2](#)
- Keeping inventory up-to-date
 - This inventory will need to remain updated during the transfer process. This means submitting updates if records are removed or added to the boxes while they are waiting to be transferred.

Remember, before a Records Transfer can occur the Transfer Inventory Worksheet must be submitted electronically, as an Excel email attachment. Download the Excel [Transfer Inventory Worksheet](#) and after completing it, submit these worksheets to: msa.helpdesk@maryland.gov Once submitted, you will receive an acknowledgement email.