

PURGING FILES AND SENDING TO ARCHIVES

(See 101-1.1.6 for forms, samples, etc.)

Executive Appointments (Boards and Commissions)

Maintains current files.
Destroys past files.
Sends nothing to Archives. (Senate and Secretary of State are offices of record concerning appointments.)

Citizens' Representative

Maintains current files.
Destroys past files.
Sends nothing to Archives.

Natural Resources

Purges files.
Sends remaining materials to Archives.

Legal Counsel

Purges files.
Sends remaining materials to Archives.

Affirmative Action

Purges files.
Sends remaining materials to Archives.

Central Files (Office Manager)

Purges files according to attached instruction sheet
Sends remaining materials to Archives.

*started in pencil
for 1984 - OK to
add files (1985 & 86)
in pencil this time
m*

GENERAL INSTRUCTIONS

Put typed labels on file folders so they can be read from the top of the box.

Type transmittal list and attached detail list according to previous record (see 101-1.1.6). Make three copies--original and two copies are transmitted to Archives with the boxes, and one copy is kept in file until signed copy is received from Archives.

Label each box:

Box 1 - Governor's Office - 1986 (appropriate year)

(then list contents exactly as shown on the transmittal detail list)

When boxes and transmittal list are ready, call Jerry Royer at Archives (8-4853). Tell him the type of records that are being sent, dates covered, and number of boxes. He will prepare a form authorizing transmittal of the files. Set up an appointment for delivery of the boxes. They cannot go to Archives until the form from them is received. Call Executive Department mail room to arrange pickup and delivery. If timing is a problem at the end of an administration, call Executive Department Accounting Administrator to have boxes stored until transfer to Archives. Do not leave the boxes in the Governor's Office.

PURGING CENTRAL FILES

SAVE

Correspondence to:

- Constituents
- Washington, D.C.
- Congressional delegation
- Senators and Representatives
- Cities
- Counties

*Proclamations
send to Archives
separate from
Central files since
they cover long
period of time.*

TOSS

Blue alpha file copies

Copies of interagency memos from state agencies

Weekly/monthly/annual reports from state agencies or others

Statistical reports

Publications/newsletters/etc.

Courtesy letters

Congratulations

Wedding anniversaries

Birthdays

Eagle Scouts

Youth letters

Commendations

Retirement

Paroles/clemency/character referencēs/etc.

Prisoners' letters/problems

Citations/assistance with court cases

Referrals to agencies/organizations

Letters addressed to this office that received no response

Telegrams or mailgrams that received no response unless part of a file

Letters returned to this office due to incorrect address

Resume's/applications/recommendations

Newsclippings unless part of a file

United Way

Cancer Crusade

Food Share

Savings Bonds

Inflammatory (sensitive) correspondence to or from this office

Personal and/or Confidential (usually internal briefing papers)

*Send Action Council files to Econ Dev (Ridley Camp) as office
of record.*

OFFICE OF THE SECRETARY OF STATE

Packing Records for Storage in the State Records Center or Archives

1. CONTAINERS: The standard records storage carton, the Archives Box, available from the Central Stores Section of the State Department of General Services is required for all letter or legal-size records, AND for all other types of unbound records unless the size and shape of the records requires special packaging. Please use new containers for all records to be stored.
 - A. CUT-DOWN ARCHIVES BOXES (height reduced to less than six inches by cutting a box in half and telescoping the bottom into the top) are required for records filed on edge with height less than six inches, EXCEPT:

TAB-CARD TRAYS may be used for tab-card size records.
 - B. SPECIAL PACKAGING must be approved by the Archives Division.
 - C. FASTEN THE BOTTOM of all containers securely but do not fasten the top. The "fold-lok" style cartons are assembled by folding the two side flaps up through the slots in the end flaps, then pressing the side flaps down to each side inside the carton. Punch in the two handles.
2. FILE RECORDS in storage containers in their regular filing order, with folders and filing guides required for use of the files. Letter-size records should face away from the glued or stapled corner of the carton. Use dividers to separate parallel rows of small size records to prevent mixing. Legal-size records should be placed in the carton so that when you face them the glued or stapled corner of the carton is to your left.
3. LIMIT CONTENTS of each container to records of a single records series, from the same file cut-off interval, so that the entire content is subject to the same retention. Do not pack containers too tightly. File-working space must be left to permit use of the packed container in the same manner as a file drawer.
4. LABEL EACH CONTAINER. On a regular agency parcel post label or a plain label at least 3" x 5" in size, type or print the following: name of your agency, division or section, title of the records series, inclusive file cut-off dates of the portion of the records being transferred, and the inclusive alphabetic, numeric, or date file guides to the records within the container on which each label is placed.
5. PLACE THE LABEL in the upper right hand corner of the long side of Archives Boxes, with the glued or stapled corner of the carton to your left. On other containers place the label on the front unless otherwise instructed at the time special packaging is approved. Limit all marks and labels to the right half of the surface used--Archives or Records Center identifications must be added on the left side.
6. MARK THE CONTAINER NUMBER and the number of containers of the records series in the shipment on, or below, the label.
7. PREPARE A RECORDS TRANSMITTAL LIST in three copies, listing each records series as a separate item, with a double space between items. Use the standard title of each records series as shown on the "Records Inventory Sheet" and approved "Records Retention and Destruction Schedule" or published "General Schedule."

BARBARA ROBERTS
SECRETARY OF STATE



ARCHIVES DIVISION
ROY TURNBAUGH, STATE ARCHIVIST
1005 BROADWAY NE.
SALEM, OREGON 97310
(503) 378-4240

RECEIVED

JUL 22 1986

1 July 1986

Governor's Office

Governor's Office
Internal Administration
254 State Capitol
Salem, Oregon 97310

Attention Betty Maudlin

Dear Ms. Maudlin:

Effective July 1, 1986, the State Records Center is making some procedural changes. We have developed a new form to be used in transferring records, form 165-AR-A8, Records Approval and Transmittal to the Oregon State Records Center. Please note the following points:

1. When you have records to transfer to the State Records Center, please contact Jerry Royer at 378-4853.
2. Mr. Royer will prepare form 165-AR-A8 and send it to you for your signature (see enclosure). All copies of this form must accompany your shipment of records.
3. Please schedule the transfer with Mr. Royer before the expiration date on the form (VALID UNTIL _____). This is to help us allocate our space.
4. When your records have been transferred, one copy will be returned to you.

Please direct any questions about this procedure to Mr. Royer. Thank you for your cooperation.

Sincerely,

Roy C. Turnbaugh
State Archivist

RCT:ph

encls.

RECORDS APPROVAL AND TRANSMITTAL TO THE OREGON STATE RECORDS CENTER

VALID UNTIL _____

PAGE 1 OF _____

<p>AGENCY:</p> <p>DIVISION OR OFFICE:</p>	<p><u>FOR RECORDS CENTER USE ONLY</u></p>		
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">ACCESSION #</td> <td style="width: 30%;">DATE REC'D.</td> </tr> </table>	ACCESSION #	DATE REC'D.
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LOCATION:			

NO.	SERIES TITLE AND FILE ARRANGEMENT	SCHEDULE ITEM #	RETENTION PERIOD	DATES	# OF CONTAINER	SPECIAL INSTRUCTIONS

_____ AGENCY HEAD SIGNATURE	_____ DATE	_____ RECORDS CENTER SIGNATURE	_____ DATE
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