Assign it to YOURSELF or you will not be able to generate the Report needed for Transfer!

Got to List Tools > List > Generate Report > Open

This is the RTL that must be sent to Admin for further processing. Admin will notify Clerk of any changes to be made and then arrange for pick up.

Preparing boxes for pick up

Ensure all boxes listed on RTL are in the stack for pick up. Barcodes should be in right hand corner of the box with 2x4 address label with the Box Number just below. Files should all face up and the same direction. Each box should have a lid. ONLY use Banker's boxes.

NOTE: The same processes can be used for other types of files to be sent for archive i.e. closed – voluntary, closed involuntary, auxiliary files etc. The *Source* is ALWAYS *Certification* and ALWAYS requires an *Inclusive Date. QA Source* files may include other types of reviews or investigations but would also be the same procedure.