













DATA PREPARATION CHECKLIST

Document preparation is a key step in Records Management. Departments seeking fast project turnaround time and retrieval should follow the checklist.



-  Place files in proper sequence.
-  Insert title page as first document in the file.
-  Remove duplicate documents from the file.
-  Make documents legible (trace over if necessary).
-  Remove any bound documents from binders.
-  Remove staples and paper clips.
-  Repair torn documents (tape).
-  Unfold any folded documents.
-  Place files in record boxes in proper sequence.
-  Complete [Records Transfer Form](#) and insert inside record storage box.
-  Complete [Box Label](#) for each record storage box and tape to the front of the box.
-  Contact Records Management for pickup or delivery of record storage boxes.