Gilmore

CONTAINER TRANSMITTAL FORM INSTRUCTIONS

The Container Transmittal form must be completed by each client to record box container information being transferred into storage. If a line of the transmittal is insufficient to record the container information, continue to the next line.

Completing the Transmittal: Fill in the data on each section of the Container Transmittal form as follows:

- **Account Information**: Enter your organization's information.

- **Container Barcode:** A unique, self-adhesive, Gilmore Services provided barcode will be given to clients for container placement before containers will be accepted for storage. Please refer to the *Barcode Placement Guide* for additional details.

- **Alternate #**: In this column, if your company is presently using an internal numbering system for tracking purposes, in lieu of a barcode system, we will associate this number as an 'alternate' number to the unique container barcode that has been assigned to the container. This 'alternate' number will still be a searchable identifier and will appear on container reports, if desired.

- **Destroy Date**: The day, month, year the container of records is scheduled for destruction. If the records should be kept permanently, either leave blank or type the word "NONE".

    To figure the destruction date, use the retention period from your approved retention schedule for the series being transferred and apply it to the latest date of the records in the shipment. For example, if the retention of the record being transferred is seven years and the latest date of the records is 2020, an appropriate destruction date might be January 1, 2028.

- **Category Code**: Use this column to provide a grouping/sorting code for your records, such as Accounts Payable, Payroll, General Ledger, etc. that would be useful for reports and locating files.

- **Date Range**: The inclusive dates (oldest and most recent) of the records in each box (roll, book, bundle, etc.). If multiple series, or date ranges, are being transferred, enter date spans per container.

- **Sequence Range:** Use this area to enter titles of the records. For alphabetical and numerical (or alphanumerical) files, enter the name or number of the first and last file of the records in the container.

- **Description:** Use this area for any additional information pertaining to the container.

After completing the transmittal retain a copy, either digitally or in paper. The client should forward a copy of the transmittal via e-mail to the Gilmore at request@gilmoreservices.com or give Container Transmittal forms to route drivers at the time of pickup.

20210201_v1a