

Digital transfer planning

1. Introduction

Transfers of digital records to us can be unique, complex and take place over extended periods of time. We will collaborate with your public sector organisation to agree on roles and responsibilities when planning a transfer of digital records and their metadata to the Government Digital Archive and the legal custody of the Chief Archivist.

2. Agree roles and responsibilities

A *Digital Transfer Management Plan Agreement*, similar to that used for physical transfers, will be discussed and agreed to during the transfer initiation and preparation stages. Its purpose is to ensure that both parties (i.e., your organisation and us) have a common understanding of key aspects of the process and are informed of factors which might affect the transfer at any stage.

This agreement is intended to guide the preparation and transfer of the test extract as well as the formal transfer of the full extract of all eligible digital records and their accompanying metadata, and to facilitate communication.

See the *Digital Transfer Management Plan Agreement template (23/Fm8)* available on our website.

3. Prepare documentation

Once we have both reached agreement to proceed with a full transfer to the custody of the Chief Archivist, we will initiate formal transfer planning and preparation. This will include preparation of a Transfer Agreement Form as well as an Access Authority Form if required.

For more information about what you need to do before and after a full transfer, see our factsheet *Digital transfer and post-transfer (23/F35)*.

3.1 Sign a Transfer Agreement

We will prepare a Transfer Agreement which you will need to sign before the digital records and their metadata are formally accepted into the custody of the Chief Archivist.

3.2 Complete an Access Authority if required

All digital records that are 25 years or older must be classified as either 'open' or 'restricted' access, regardless of where they are held. If eligible digital records are transferred to us before the 25-year limit (which we strongly recommend), their access status must be determined as part of the formal transfer requirements.

If any of the digital records and/or their accompanying metadata in the proposed transfer is classified as 'restricted' access, you will need to complete and sign an Access Authority form before the files are formally accepted into the custody of the Chief Archivist.

See our website for more information about the transfer process.