Approved Storage Transfers – Patterson Pope

1. Do you have a current account with Patterson Pope?
   a. Yes – Move to Step 2.
   b. No – Visit the Storage Account Creation page to request one and then wait for confirmation
2. Are your boxes entered into the University Records Management Application (URMA)?
   a. Yes – Move to Step 3.
   b. No – You must enter boxes into URMA before you can transfer them to Patterson Pope.
      i. URMA access requires the following (see URMA Account Creation Page for more information):
         1. Attendance at a "Records Management for…" class
         2. Attendance at an URMA training class or one-on-one session
         3. Supervisor authorization

3. Request a pick-up through URMA
   a. Log-in and locate the records you wish to transfer on the Home Page.
      i. TIP – search all boxes assigned to your Organization by putting % in the Organization Assigned search field
   b. Click the checkbox on the left for each box you wish to transfer to Patterson Pope.
   c. Click the Activity menu and select Request Pickup
   d. Click the orange Search button (do not enter anything into search box)
   e. Click Storage Locations tab
   f. In Facility Name field, type Patt%
   g. Click the green Search button below.
   h. Click the radio button next to "Patterson Pope" in the results display
   i. Click Apply All
   j. The search box will now be filled with the numerical identifier for the Patterson Pope location.
   k. Add comments (if needed) to the Comments text box.
   l. Click the green Request button.
   m. The Request Results screen will appear noting the number of requests and whether they were successful. Click OK.

4. URMA will generate a notification to Records Management Office staff. You will be contacted shortly to confirm your request.

5. Records Management Office staff will send your labels through messenger mail with instructions for affixing them. A list of barcode numbers will accompany the instructions.
   a. VERY IMPORTANT – affix the correct Patterson Pope label with the associated URMA box number on the list

6. Contact the Records Management Office at records@virginia.edu once your labels have been affixed.

7. The Records Management Office will contact Patterson Pope, who will then contact the requestor directly to set-up a pick-up date/time.

8. Email records@virginia.edu to confirm that the boxes were picked up.