There are many steps involved in processing a collection and writing a finding aid. Before you move on to the next collection, review this list, checking each item as you determine it has been completed. Write “n/a” in fields that do not apply. Turn this sheet in to your supervisor with the other completed worksheets included in your processing packet.

**Date:**

**Repository:**

**Collection:**

**Processor(s):**

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### PROCESSING

- All records and items in the collection have been accounted for and included (I verified this with my supervisor and/or repository staff).
- Folder labels are complete; folders are labeled with at least collection name/number, folder title and box and folder numbers consistently recorded on the tabs.
- Boxes are numbered and labeled, with new labels.
- Volumes are numbered and identified, with new labels/book marks.
- Boxes and volumes have been returned to the shelf, in numeric order.

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### FINDING AID

- At the collection level record
  - DACS compliant collection title.
  - Collection dates have been adjusted, and recorded in the dates field in AT.
  - Linear footage has been recalculated and containers/volumes counted. This information has been recorded in the extent field of AT.
  - Each series/subseries title starts with “Series I.” or “Subseries a.”, etc.

- **Click on the “Notes etc. & Deaccessions” tab**
  - Scope and contents note.
  - Biographical/historical note.
  - Abstract.
  - Language of the materials note (if there is more than one language).
  - Conditions governing access.

- **Click on the “Names and Subjects” tab**
  - Review existing authorities.
  - I compiled an add/remove list for my supervisor.

- **Click on the “Finding Aid Data” tab**
  - DACS compliant title.
  - Enter your name as author.
  - Select DACS as the description rules.
  - Assign a language of the finding aid.
  - Sponsor note (if necessary).
  - Transcribe the series names.

- Change the finding aid status to “under-revision”.

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### WORKSHEETS

- Processing worksheet.
- Digitization worksheet.
- Preservation worksheet.
- Research Value Rating worksheet.

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### EDITING AND REVIEW

- Review teammate’s work and provide feedback.
- Copy HTML report into MS Word, to review finding aid for spelling and grammar issues.
- Correct all spelling/grammar issues in AT.
- Re-export HTML AND EAD, and send to supervisor.
- Schedule appointment with supervisor for **date/time** to review worksheets, the finding aid and collection.