

Collection Level

- Title: Correct when checked against agents and scope and contents note; DACS compliant (creator, type, topic); uses established names forms
- Identifier: In one box e.g. MSS 2171
- Level of description
- Resource Type
- Publish (not checked if new collection)
- Restrictions Apply box checked for any level of restrictions noted below? (Is there an accompanying Access Note?)

Languages

- Both Language and Script selected for all prominent languages in the collection
- Language note present if needed

Dates

- Date formatted correctly? (approximately used instead of ca, circa, etc.)
- ce and Gregorian are selected
- Does certainty selection match date expression?
- Are bulk dates needed?

Extents

- "Whole" vs. "part"
- Plural version of type selected if applicable
- Container summary filled out with linear ft. vs. containers

Finding Aid Data

- EAD ID: e.g. UPB_MSS2171
- Finding Aid Title: e.g. Register of the George D. Marler papers
- Finding Aid Filing Title: Marler (George D.) papers
- Finding Aid Date: DACS compliant?
- Finding Aid Author: All authors represented?
- Description Rules: DACS selected

- Language of Description
- Script of Description
- Language of Description note (e.g. Finding aid written in English in Latin script.)
- Finding Aid Status

Revision Statement

- Date does not show up in description, only in date field.
 - Date DACS compliant?
 - Revision description formatted as [description]; [author].
- Related Accessions: All have been linked to record, check revision statement and case file for clues about missing accessions.

Agents

Check linked agent record

- Publish
- LOC link
- Source
- RDA rules selected
- Check name forms
- Dates of Existence
- Standardized biographical note with abstract and dates
- Citation note

Agents in finding aid

- Relator term selected for creators
- Creator listed as subject as applicable
- Other agent subjects present?

Subjects

- CCLA broad and narrow- one set selected?
- Are genre/form subjects present?
- Are there topical subject(s) present?

- Do subjects mirror agents?
- Optical disk selected instead of DVD, CD, etc.

Conditions Governing Access Note

- Check case file or processing plan for restrictions or “Open for public research.”
- Freezer/Cold Vault items flagged
- For when no analog exists for digital file: Digital copy only. [Digitized audiovisual recordings, digital images, digital files, etc.] available for use in the Reading Room.
- Immediate Source of Acquisition Note: [Action]; [Action agent]; [Date of action].
 - Is the date Turabian style?
 - Is each action separated into their own Acquisition Note?
 - Matches Custodial History Note
- Existence and Location of Copies Note (if applicable)
 - Digital copies of [audiovisual recordings, etc.] available for use in the Reading Room.
- Appraisal Note:
 - [Criteria] ([Collection development policy title], [Section identifier from policy], [Date of policy]).
 - [Appraisal description].

Arrangement Note

- Appears in correct format: Arranged in four series: 1. Joe Smith correspondence, [date]. 2. [etc.]
- Do the dates in this note match the titles and dates in each of the series?

Biographical/Administrative History Note:

- Appropriate time-bound language (i.e. As of 2015...)
- Dates identified if possible
- Established name used
- No abstract
- Relationship of the creator to the materials is clear
- Reflects the materials and date ranges of the specific collection
- Custodial History Note

- Matches Acquisitions Note

General Notes

- Statement of hybrid finding aid (e.g. Only select files from within the collection are described and linked to this description.)
- Date of reproduction (e.g. Microfilm. Provo, UT : Brigham Young University, 1983.)
- Statement of title source for single item collections.

- Other Finding Aids Note:

Item- and file-level inventory available online.<extref xlink:actuate="onRequest" xlink:href="http://files.lib.byu.edu/ead/XML/MSS2219.xml" xlink:show="new" xlink:title="Helen Foster Snow (1907-1997) Collection"><http://files.lib.byu.edu/ead/XML/MSS2219.xml></extref>

- Removed if XML is migrated; Catshare XML tracking spreadsheet is updated.

Processing Information Note: [ACTION]; [ACTION AGENT]; [DATE OF ACTION]. [NOTE].

- Does it match the Revision Note?
- Is each action separated into their own Processing Notes?
- Is the date Turabian style?

- Related Materials Note

- See also [Title] (MSS #).

Scope and Content Note

- Dates present in Turabian style (no hyphenated date ranges when used in a sentence)
- Name of Church spelled out/Mormon term used differently if applicable
- Degrees and titles not preceding a name are uncapitalized
- Spell out whole numbers under 100, any number beginning a sentence
- All acronyms spelled out the first time, including United States and military names
- Creators name is included
- Contextual information beyond documentary forms is present (who, what, when, where, why, how?)

- Separated Materials Note

- Conditions Governing Use Note:

It is the responsibility of the researcher to obtain any necessary copyright clearances. Please direct any questions to Reference Services at specialcollections@byu.edu.

Instances (Correct type selected; correct container type selected; barcode and location present or assigned to Collection Management)

Deaccessions

Portion

Description

Reason

Disposition

Date (of deaccession, not of materials!)

Extents

Export EAD : Spell check, scroll through Unique IDs for discrepancies, does it validate?

Inclusive language issues addressed

Items added to SIP backlog, biographical note backlog, or Publications Cataloging backlog

Series Level

Title: Correct when checked against agents and scope and contents note

Component Unique Identifier

Level of Description

Publish

Restrictions Apply (Is there an accompanying Access Note?)

Languages (Only present if it is different from the level above- delete if the same!)

Both Language and Script selected

Language note present if needed

Dates

ce and Gregorian are selected

Are bulk dates needed?

Extents

"Whole" vs. "part"

Plural version of type selected if applicable

Agent Links if different from collection level

Subjects

Are genre/form subjects present?

Conditions Governing Access Note

Check case file or processing plan for restrictions

Freezer/Cold Vault items flagged

Arrangement Note

Appears in correct format: Arranged in four series: 1. Joe Smith correspondence, [date]. 2. [etc.]

Do the dates in this note match the dates in each of the subseries?

Existence and Location of Copies Note (if applicable)

[Digital copies of audiovisual recordings available in the reference room.]

General Notes

Statement of hybrid finding aid (e.g. Only select files from within the series are described and linked to this description.)

Biographical/Administrative History Note

Are these all present if the creator agents at this level are different from those at the next level above?

Label filled out

Appropriate time-bound language? (i.e. As of 2015...)

Dates identified if possible

Established name used

No abstract

Scope and Contents Note

Dates present in Turabian style (no hyphenated date ranges when used in a sentence)

Name of Church spelled out/Mormon term used differently if applicable

Degrees and titles not preceding a name are uncapitalized

Spell out whole numbers under 100, any number beginning a sentence

- All acronyms spelled out the first time, including United States and military names
- Instances (Correct type selected; correct container type selected; barcode and location present or assigned to Collection Management)

File/Item Level and digital prep

- Title: Contains creator, format and subject if applicable
- Component Unique Identifier
- Level of Description
- Publish
- Restrictions Apply (Is there an accompanying Access Note?)

Languages (Only present if it is different from the level above- delete if the same!)

- Both Language and Script selected
- Language note present if needed

Dates

- ce and Gregorian are selected

Extents

- "Whole" vs. "part"
- Plural version of type selected if applicable
- Container Summary
- Physical details
- Dimensions
- Subjects (Genre/form only)
- Existence and Location of Copies Note (if applicable)

[Digital copies of audiovisual recordings available in the reference room.]

General Notes

- Title source stated
- Captions/other notes from material transcribed
- Date of reproduction (e.g. Microfilm. Provo, UT : Brigham Young University, 1983.)

- Instances (Correct type selected; correct container type selected; barcode and location present or assigned to Collection Management)
- Collection Management assigned to add AV/Computer media sticker or APS has added these to boxes

Overall

- Overall description: Does the information provided in the finding aid for each level provide enough context for a researcher to understand its provenance, content, creators, and formats? Is there anything confusing, misleading, or too brief?
- Are there typos present? Have the notes been copied into Word and checked for typos, or the finding aid exported and checked in oXygen?