Records Management

Records Inventory & Classification	Retention Scheduling	Records Storage & Conversion	Vital Records	Disposition

Records Inventory & Classification: The start of any good records management program, whether one is going to develop their own records retention schedule one has to know what records they have and are responsible for. To this end one conducts a records inventory that is a complete and accurate listing of their records**,** whether paper-based, microform, or electronic.

Retention Scheduling: All records have a lifecycle. That life may be as short as a few hours as is the case with some transient records or may be as long as forever as is the case with records of enduring historical value. A records retention schedule is a comprehensive listing of the records an organization maintains that notes at a minimum how long they must be retained along with their ultimate disposition.

Records Storage & Conversion: Once one has determined what records they have and how long they need to be retained, they need to develop a filing and storage strategy and/or determine if their existing filing and storage strategy is adequate. Questions one needs to address include:

- How do you classify your records for ease of retrieval?
- What are the access procedures for sensitive records?
- Where and how do you store your *active* records?
- Where and how do you store your *inactive* records?
- Do you have a "records hold" procedure in event of litigation?
- How are you storing your electronic records?
- Have you identified your Vital Records?
- What are the environmental condition of your storage facilities?

 Vital Records: Vital records are those essential organizational records needed to meet operational responsibilities under emergency or disaster conditions. An organizations needs to ask themselves: *"What records are absolutely crucial to our business operation that will need to be recreated from backup copies if the originals are lost or inaccessible in a disaster?"* Vital records should be identified as in integral part of a disaster prevention and recovery plan for business continuity.

Disposition: Disposition is the final administrative action taken by an organization with regard to a records; these actions typically fall into two categories:

- Destruction via disposal in trash or recycling, shredding, and deleting or other electronic obliteration;
- Transfer to an archives for permanent preservation
- When one regularly deals with the disposition of their records, they "lighten the load" of what they need to retain and manage.