

FORT WORTH ISD | FOR THE RECORD DISTRICT RECORDS MANAGEMENT

Records Storage Audit
(E-Course #3)



Custodian of Record Duties

- Complete all District Records Management trainings
- Communicate District Records Management regulations to location data owners
- Maintain the location's storage area in an organized manner and ensure that all location data owners follow the district storage procedures
- ***Participate in a records storage audit***



FWISD Records Storage Audit

A storage audit is a **process** where Records Management department personnel examine your records storage area and provide actionable feedback and/or and recognition.

Audit benefits include:

- District records management support
- Training
- Resources





Storage Audit Overview



Audit Schedule

- Records Management Scheduled
- On Request

Audit Components

- Storage Room Condition
- Storage Room Safety
- Storage Boxes
- Recommended Actions



Storage Audit Overview: Room Conditions

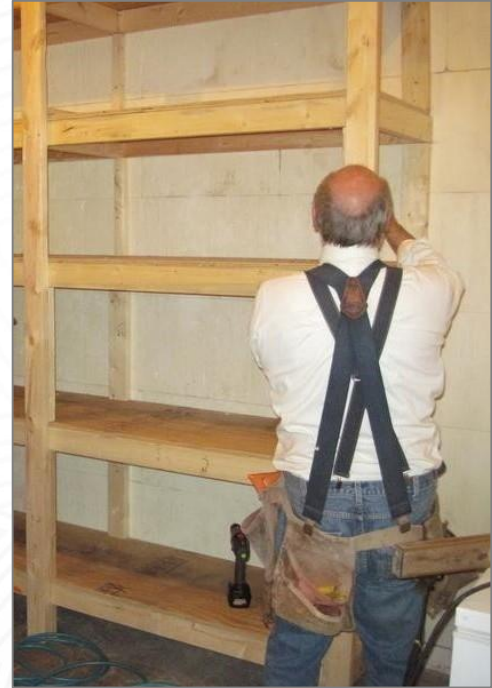
- Room is clean and free of trash
- Area is adequate for amount of records being stored
- Room is only used to house records
- Room is accessible and secure





Site Audit Overview: Storage Room Safety

- Any free standing shelves are secured
- Heavy items stored at suitable height
- Records stored on shelf with no overhang
- Room has adequate lighting
- Fire detection system present





Storage Audit Overview: Storage Boxes

- Banker boxes are used to store records
- No signs of damage to boxes such as water or rodent
- Boxes are labeled and in good condition
- Records are not exposed to direct sunlight, fire, steam or theft
- Records and/or boxes are not in contact with floor
- No boxes past retention date present





Storage Box Don'ts

When packing your boxes, be sure to remove:

- binders and clips
- hanging and plastic file folders



Make sure that your boxes are not over packed and authorized banker boxes are used



Storage Audit Report and Follow-up

Each audit results in a formal report that reflects:

- Date and type of audit such first visit or follow-up
- Detailed ratings and comments on:
 - Storage conditions
 - Storage room safety
 - Storage box
 - Recommended actions if appropriate
- A follow-up visit for on-site training and assistance can be requested





Question #4



If you were conducting an audit of this storage area, what recommended actions would you suggest?





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