

RECORDS MANAGEMENT CHECKLIST

- ✓ Develop a Department File Plan to systematically capture information about departmental records and data
- ✓ Create a Taxonomy for consistent files/folders naming to ensure efficient retrieval of information
- ✓ Document the types and organization of folders/files
- ✓ Develop a review cycle for managed records
- ✓ Confirm which records are archival and require historical preservation
- ✓ Identify and establish security and protection of records containing personal or confidential information
- ✓ Identify and document long term retention requirements and establish migration and conversion plans for electronically stored information
- ✓ Document disposition and destruction
- ✓ Maintain records documenting all of the above