For the Record...

TRACKING PAPER RECORDS WHILE WORKING REMOTELY

Employees working remotely should access and use electronic versions of records whenever possible. Employees should only bring paper records home if they have approval from their unit to do so.   If an employee requires the use of paper records to work from home, the employee must keep the records safe while in transit and at the employee's home, and ensure they are returned to the workplace.

File movement should be monitored using a tracking list indicating who is 'checking out' and 'checking in' records. One person in the unit should be tasked with keeping track of all the files that have been checked out centrally, and updating the table once files are returned. Employees can send the designated individual an email with the applicable details for checkout and then a follow-up email for the return. Once offices are back to onsite operations, this tracking list should be used to ensure all files are returned.

An example of a file tracking list is provided below:

Borrower Name	File #	File/Series Title	Description	Date Out	Date Returned

A good way to share this list with your unit is through Document Manager, the University's web-based enterprise file sharing solution. Other ways to share include maintaining the list on a central location on your unit's network shared drive.

For questions and/or assistance on any of the above guidance, contact Information Management & Protection.