

INFORMATION INVENTORY WORKSHEET - PAPER RECORDS

INSTRUCTIONS

(Numbers are keyed to item numbers on the form.)

1. Enter Records Class Title/Sub-Title.
2. Description of records. *(Do not use acronyms.)*
3. File location. Draw a map of the office containing records. Draw rectangles to signify location of file cabinets, then number them from left to right. Identify each drawer or shelf by alphabetizing them starting with "A" at the bottom and going up as high as necessary. Thus, if a file class were contained entirely in the third drawer/shelf from the bottom in cabinet number 12, the location of the file class would be recorded on this space as 12-C. Once you complete the map, enter the cabinet and drawer/shelf designations on this space for the file class you inventoried. Attach map to inventory sheet(s).
4. Enter the years covered.
5. Enter reference status code (see Reference Status definition at right).
6. Enter a **X** in the appropriate column to indicate original record.
7. Enter the approximate volume of each file class in cubic feet.
8. Use the "COMMENTS" space to annotate any vital, confidential, legal requirements, or policy issues that support or define retention periods or destruction method. Also, indicate RU (if unique from others) and value of record to the University (See OPR and Value definition at right)
9. Person completing the inventory worksheet should sign and date the worksheet.
10. Program manager should sign when reviewed and approved.

DEFINITIONS

FILE CLASS TITLE: a group of related records arranged under a single filing category, kept together as a unit because the support and document a function, activity or related tasks and transactions.

RECORDS DESCRIPTION: complete and concise description if the title is not completely self-explanatory.

FILE LOCATION: the specific location of the records being inventoried in an office or in departmental storage.

REFERENCE STATUS: A - Active records: records that need to be readily available. S - Semi-active records: records that are accessed occasionally and can be moved to a holding area. I - Inactive records: records that are no longer required in the current business activity and can be stored offsite.

VALUE: indicate if record has historical, legal, fiscal or administrative value to the University in the "Comments" section.

Responsible Unit (RU): Indicate if the Responsible Unit is another Unit or Department in the "Comments" section.