Flow-Chart of Records Management

START
Identify Records Custodian
Identify Records Material
Develop and Maintain a Records Index or Equivalent
Establish Filing Method & Physical Environment
Complete Records Inventory Form
Enter into Dept. Records Management Database
Update Records Inventory at Appropriate Intervals, Identify New
Can record be forwarded to on-site storage area?
YES
NO
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Vital Record?
YES
NO
Complete records transmittal form

Electronic Records

Obtain Designated Records Storage Boxes, Mark Folders Clearly, and Pack
Submit Records, Transmittal Form, and Listing of Each Box's Content to Records Administrator
Contact the Records Administrator
YES
NO
Is Records Retrieval Required?
YES
NO
Records Stored and Destroyed When Retention is Reached
Update the Department Records Management Database

Note: Items which are italicized are management or administrator functions

END