

# 10 Quick Ways to Improve Records Management in Any Office

In most offices only about 25% of the paper is program record materials that need to be managed in the office. That means that 75% of the paper mountain we face falls into one of the following categories:

- Administrative records used to carry out routine operations.
- Older program records that can be stored offsite.
- Working files used by staff to carry out their assigned duties.
- Reference materials.

The trick to good records management is identifying which of the files in your office belong to each category, and managing them appropriately. Here are 10 suggestions for improving records management in your office. By applying any or all of them, you will decrease the amount of paper in your office, increase the amount of available space, and improve staff efficiency. The key idea is to understand what portion of the paper in your office really needs to be managed.

1. Segregate your paper into four categories: records for which your program is responsible, administrative records, working files, and reference materials.
2. Set up a "records center" or official file station for your major program files. Make someone responsible for each major program file your office maintains, and send those persons to records management training.
3. Apply your records schedules. Most programs keep more records longer than they need to. Hold regular cleanup days to encourage staff to retire older records to the Federal Records Center or recycle them as the schedule specifies.
4. Draft lists of documents that need to be included in the official program files and those that don't need to be retained. Coordinate this list with your records manager and counsel as necessary.
5. Cut off your program and administrative files at the end of each year. Start new files and bring forward only the material that is still active. This will simplify retiring inactive records later.
6. File records by type and by disposition rather than filing everything together. For example, file final reports which have a long retention and active life separately from drafts which have a short retention. Separate controlled correspondence from general correspondence, and so on.
7. Use the Agency's file codes to help you organize your files. Arranging them in this manner will assist with the year-end cleanup process.
8. When you create a new type of record or file, develop a disposition for it in conjunction with the records management program. This will allow you to plan how long you need to retain records.
9. When you automate, be sure to include records management considerations and responsibilities in your mission needs analysis.

10. Set up a central reference file for documents that are needed by the staff on an occasional basis, rather than having each staff member retain a copy.

**For more information**

If you would like to know more about records management in APHIS, e-mail [records@aphis.usda.gov](mailto:records@aphis.usda.gov).