



Records Management Guidance

Physical Records Checklist

Use this optional checklist as a tool to help prepare for efforts to manage physical records, including but not limited to: inventorying records, consolidating records, destroying records, scanning records, and sending records to the Records Center or Archives.

Resources	
Optional tools to print or have available while working with paper records	
	Applicable records retention schedule(s)
	Blank inventory form(s)
	Blank destruction form(s)
	Transitory records guidance
	Records Center Box Packing Guidelines
	Empty Records Center boxes (only #FEL-12772 from Keeneys)
	Blank Records Center Box Labels (order from Print Shop)
	Content Manager Physical Records Training (online – 30 minutes)
	Manila folders (optional)
	Access to recycle bin/shredder

Requirements	
Things to keep in mind while working with paper records	
	Ensure that you have permission to be in the office (if applicable)
	Ensure health and safety by complying with COVID-19 requirements (wear face masks and keep distance from coworkers)
	Remove 3-ring binders, hanging file folders, binder clips
	Recycle or shred transitory records that are not needed
	Ensure security of records as defined by your agency

