# RECORDS INVENTORY WORKSHEET

# INSTRUCTIONS

The following form is intended to support the identification and storage of the organization’s records. This form should be completed for every box of organizational records transferred out of offices and into storage spaces.

The organization should amend this template so that it is relevant to the organization’s own needs. The organization should develop a database or Excel spreadsheet to hold the data gathered from this form, so that it can search for its records easily. Ideally, a secure space in the office should be dedicated to housing all organizational records in storage, and this room should be equipped with strong and sturdy metal shelving, appropriate environmental and temperature controls, and enough room to grow. The records storage area should be maintained by staff with formal responsibility for the task, so that organizational records are not misplaced.

When completing this form, be sure that records from different departments are kept together. If records in one box come from more than one department, either transfer the records into separate boxes, by department, or complete different forms for each department represented.

Before beginning the inventory, assign each box a number, such as GR 1, GR 2 (for Government Records 1, Government Records 2, etc.) or ORG 1, ORG 2 (for Organizational Records 1, and so on). Choose codes that will be meaningful to your organization and then use them consistently. The code will be used to identify each box of records received from any department, so that when boxes of records are put into storage they can be found again by linking the box number to the file listing held in a database or spreadsheet.

When the form is completed and all file titles listed on the inventory worksheet, input the information gathered into a dedicated database or spreadsheet. Then place one copy of the inventory worksheet in the box and keep one copy in a records inventory binder. Label the box with the box number, name of department, and date that the box contents were listed and the box put in storage.

Once the box has been labelled, place it on the appropriate shelf in numerical order. Keep track of the last number used for each box, so that there is no risk of duplicating box numbers.

Once the data has been added to the database or spreadsheet, place the completed worksheet in a binder and keep it safe until a printed report or other record is produced, so that in the event of problems with the database it is possible to refer back to the paper record and recreate the information. Once there is no question that the information in the database is secure, the handwritten forms can be destroyed.

**THIS FORM SHOULD BE REVISED AS APPROPRIATE.
ANY CHANGES TO THE FORM SHOULD BE EXPLAINED IN
REVISED AND UPDATED INSTRUCTIONS.**

# REFERENCE PUBLICATIONS IDENTIFICATION WORKSHEET

# TEMPLATE FOR DATA ENTRY

**AMEND AND UPDATE AS NEEDED FOR EACH SPECIFIC ORGANIZATION**

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| **Name of Department** |
| **Contact Name in Department** | **Telephone / E-mail Address of Contact** |
| **Date of the earliest records in the box** | **Date of the most recent records in the box** |
| **Name of Person Completing this Worksheet** | **Telephone / E-mail Address** | **Date Inventory Taken** |
| **Remarks and Comments (anything unusual about the contents of the box, questions to be answered by the department, and so on)** |
| **Type of records found in the box (tick all the different types of records found in the box; if other formats are included, make a note of what they are; feel free to add any additional comments to help explain the types of records)** |
| 🗖 Unbound paper records | **🗖** Audiocassettes  | **🗖** Photographic prints | **🗖** Photographic negatives |
| 🗖 Bound paper records (such as reports) | **🗖** Videocassettes (VHS tapes) | **🗖** Electronic records (describe type) | **🗖** Other formats (describe type) |

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| **List of Files in Box**Fill in information for each file in the box, as shown below. If there is no formal title or label on the file, provide a brief description of the contents. Add a sequential number to each file in the box, writing the box and file number in the top right hand corner of the folder if possible, even if there is a number on the file already. This numbering helps ensure that all files remain in their order and can be found and returned easily.  |
| **Sequential Number** | **Original file number** | **File Title or Description of Contents of File** | **Earliest Date** | **Most Recent Date** | **Comments** |
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