RECORD KEEPING AND MANAGEMENT

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Every organization, business or enterprise has to keep track of its transactions through proper record keeping. Records must be kept in such a way that they are made available once that they are needed. Systems must be in place to assure that there is easy retrieval of data. If these are not done accordingly, useful information maybe lost or become useless if not given timely and accurately.

So, how are records properly and efficiently managed? There are steps to be considered in doing the tasks. Following are the very basic ones.

1. Records Inventory and classification: The beginning of any viable records management program require the knowledge of the nature of records and who are responsible for filing those. Therefore, records inventory, which is complete and accurate, must be conducted.

2. Retention Scheduling: Records, just like assets, have a definite life span which maybe as short as a few hours or as long as forever as the case with records of enduring historical value. Analysis and determination of the perpetuity of records is affected by the legal, fiscal and administrative needs of the agency. A records retention schedule is a comprehensive listing of the records an organization maintains. This specifies the minimum time they must be in the active file along with their final disposition.
3. Records storage and Conversion: Once that the types of records they have and defined the length of time they have to be retained, the creation of a filing and storage method is obligatory. Ease of retrieval, access to sensitive records, storage of active and inactive vital records are just some of the considerations to be given emphasis in planning what system is to be implemented. It is also worth mentioning that at some point in a record’s life, conversion maybe exigent to enhance access, reduce physical storage or to provide disaster recording and preservation tools.

4. Disposition: Disposition of records is the final administrative action taken by an organization as regards to records. The coordination with the National Archives must be done before any records could be disposed. The said Office will determine and advise whether records are for destruction or transfer to their office for permanent preservation.

Records, like finance, are mandatory to any establishment, consequently, record-keeping and management will always be very crucial to the smooth and unimpeded flow of the organization.

References:

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