Is It A Record?

Recorded Information

Are you or your organization the creator of the record? Did you generate or receive the information to use for your technical/administrative work in conducting agency business?

- YES → **RECORD**
- **NO** ↓

Does it contain informational value as evidence of your organization's functions, policies, decisions, procedures, operations, mission, programs, projects, or activities?

- YES → **RECORD**
- **NO** ↓

Is it material that originated in another office or outside your agency, but you commented or took action on the material?

- YES → **RECORD**
- **NO** ↓

Does it document business actions, such as: what happened, what was decided, what advice was given, who was involved, when it happened, the order of events and decisions?

- YES → **RECORD**
- **NO** ↓

Is it an original document related to agency business that does not exist elsewhere?

- YES → **RECORD**
- **NO** ↓

Is it a draft or interim document that has not been circulated to others or does not contain substantive comments and for which there is a final version being maintained?

- YES → ~~**RECORD**~~
- **NO** ↓

Is it published or processed information that you received and use as reference?

- YES → ~~**RECORD**~~
- **NO** ↓

Is it a copy of a document or correspondence kept only for convenience of reference on which no action is taken?

- YES → ~~**RECORD**~~
- **NO** ↓

Is it information accumulated and maintained at the workplace, but which does not affect or reflect the transaction of your program business?

- YES → ~~**RECORD**~~
- **NO** ↓

Is it junk mail or documentation that has no work-related informational or evidentiary value?

- YES → ~~**RECORD**~~

When in doubt, treat it as a record.
Call your Records Officer for information.

Courtesy of Anna W. Nusbaum, CRM
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