Checklist

Use the below to support your understanding and implementation of the guidance provided in the GuideBook:

Understanding Records Storage

— Review best practices for the development and operation of any physical records storage locations including file rooms, central filling, information service centres, and off-site departmental records storage space.

Physical Record Storage

— Review requirements for square footage, cabinets, boxes, environmental protections, retention periods, protection, and overall searchability and retrieval are all concerns that affect an IM Program's efficient management of physical records.

Electronic Record Storage

— Review centralized storage of electronic records. Working closely with stakeholders related to your information assets will support a compliant risk based approach to managing and storing electronic records.

Record Imaging/Scanning

— When considering imaging/scanning records, you must ensure records are appropriately received, prepared, indexed and verified. Each of these phases ensure imaged/scanned records are of high quality, accessible to users and managed properly.

Monitor and Verify

— Review and validate compliance, performance and capacity of the records disposal needs of the organization.