|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Inventory Date:** | [ yyyy-mm-dd ] |  | **Organization:** | [ add name of organization ] |
| **Inventoried By:** | [ add the name of the person who completed inventory ] |  | **Division/Section:** | [ add name of division, section and/or unit as applicable ] |
| **Role/Title:** | [ add the role responsible for completing inventory ] |  | **Role/Title:** | [ add the role responsible for maintaining records ] |
| **Principal No:** | [ add the reference from the Principal Inventory File ] |  | **Person:** | [ add person who is currently occupying the above role ] |

**Record Series Identification**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Working Record Series Title:** | |  | | | | |
| **Location of Record Series:** | |  | | | | |
| **Description:** | | [ Add summary of contents; continue on reverse if required, include filing patterns ] | | | | |
| **Records Status:** | | | **Records Medium:** | **Electronic Format Type:** | | **Storage:** |
| 🞏 Original  🞏 Copy  🞏 More than one medium  🞏 Duplicated Elsewhere  Explain:  🞏 Official Record | | | 🞏 Paper  🞏 Electronic  🞏 Microfilm/fiche  🞏 Maps/drawings/photo  🞏 Other | 🞏 MS Office File  🞏 PDF  🞏 EDRMS  🞏 Database  🞏 Other | | 🞏 Filing Cabinet ( 🞏 Lateral 🞏 Vertical )  🞏 Records Centre  🞏 Electronically Stored Information  ( 🞏 On premise 🞏 Cloud )  🞏 Other |
| **Arrangement:** | | | **Volume (Extent of Records):** | **Inclusive Dates:** | | **Estimated Activity** |
| 🞏 Alpha  🞏 Subject  🞏 Numeric  🞏 Geographical | 🞏 Alpha-numeric  🞏 Chronological  🞏 Other | | 🞏 Per linear foot 🞏 Boxes  🞏 Gigabytes 🞏 Other | From:  To: | | Frequency of use:  🞏 High (Daily)  🞏 Medium (Once a Week)  🞏 Low (Less than once a month) |
| **Business Value:** | | | **Essential/Vital Value:** | **Access Status:** | | |
| 🞏 Administrative  🞏 Operational  🞏 Legal  🞏 Financial | 🞏 Audit  🞏 Scientific  🞏 Enduring  🞏 Historical | | 🞏 Support Business Continuity  🞏 Legal or Regulatory Requirement    🞏 Other | 🞏 Full Access  🞏 Internal Access Only  🞏 Restricted Internal Access  🞏 Personal Information Bank  🞏 ATIPP Exceptions | If Internal Access Only or Restricted – state why    If ATIPP Exceptions indicate Sections(s) | |
| **Lifecycle Phase:** | **Retention:** | | | **Applicable Disposition Authority:** | **Legal Rational:** | |
| 🞏 Active  🞏 Semi-Active  🞏 Inactive | 🞏 Current Year  🞏 Fiscal Year  🞏 Audit  🞏 Annual reporting | | 🞏 Event ends  🞏 Statutory requirements  🞏 Other purpose or event |  |  | |