

FILING SYSTEMS

Considerations When Setting Up a Filing System

1. Your filing system is part of the University's memory.
2. Filing systems must fit the business needs of the unit. There is no "one system fits all".
3. Information should be easy to separate when its active life is over.
4. Electronic filing systems, when possible, should "mirror" paper systems.

Tips for a "Disposition Friendly" Filing System

1. Set up new files on an annual basis (include year in label).
2. Use the functional categories and series names within the UNC General Schedule whenever possible.
3. Use different color labels for years, or categories.
4. Create a master filing list of all your folder names (keep the list at the front of the file drawer).
5. Include retention times in your master filing list.
6. Create central filing systems within offices to reduce duplication of records and makes sending items to Archives easier.
7. Plan an annual "*Purge and Send to Archives Day*" (if you have this as a whole office activity, make it fun and order lunch).
8. Check your files periodically for reference articles, publications, working papers, and extra copies. Remove those that are no longer useful.
9. Make sure you follow University approved Records Retention and Disposition schedules.



Assistance Setting Up a Filing System

Records Management information, including retention and disposition schedule, can be found at http://its.uncg.edu/Records_Management/

For records management questions or assistance, contact the University Records Officer through 6-TECH at (336) 256-TECH (8324)