

3 Principles of Personal Records Retention



It's important to keep hard-to-replace records organized for long-term storage. Here are some ideas to help keep your future reference information safe and accessible.

Follow these three principles when organizing future reference material:

1. Evaluate.
2. Catalog.
3. Update.

A little routine maintenance is all it takes to keep the records useful and make you feel confident that you can find whatever you need. Smead recommends using colored FasTab Hanging Folders with Viewables Labels in a file drawer or cabinet.

Evaluate

- Review material to be archived to decide if you really need to keep it.
- Throw out any information that is easily accessible on your computer or on the Internet.
- Do not keep reference material that is quickly outdated, such as price lists or catalogs.
- Store materials in Colored FasTab Hanging Folders. Use different colors to separate categories of material.

Catalog

- Label FasTab hanging folders with Viewables labels for clear identification.
- Export the file names from Viewables into a spreadsheet application.
- Add columns for keyword cross-referencing and for assigning purge dates.
- Use the search function to locate file headings using keywords or other cross-reference data.



Update

- Remove unnecessary files from archives periodically. Throw away all outdated or expired information.
- Sort the spreadsheet by purge dates to locate records to remove from the system.

