

The Commonwealth of Massachusetts

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FORM RMU-IW – RECORDS INVENTORY WORKSHEET

1. Department: _____ Division: _____ Section: _____

2. Title of Records Series: _____

3. Description of records series (content, purpose, etc.) _____

4. Location of records: _____

5. Earliest date/latest date: _____

6. Volume: _____ cu. ft. 7. Annual Accumulation _____ cu. ft.

8. Arrangement: Chronological Alphabetical by _____ Numerical by _____ Other _____

9. Size of records: _____ 10. Format of records: Typewritten Handwritten Other: _____

11. Reference frequency (insert numbers and circle appropriate words):

_____ times - daily, weekly, monthly, yearly, for _____ months, years. Never after _____

12. Information available elsewhere? Yes No If yes, where? _____

13. Microfilmed? Yes No If yes, explain? _____

14. Are records indexed? Yes No If yes, identify? _____

15. How stored: Filing cabinets Shelves Boxes Other _____

16. Condition of Records? Good Poor Explain any problem. _____

17. Records on retention schedule?

Yes No If YES, retention period _____ and schedule number. If NO, suggested retention period and justification. _____

18. Condition of storage area (security, fireproof, alarms, environment, etc.)?

Good Poor Explain any problems? _____

19. Additional comments: _____

20. Name of person completing worksheet: _____ Date: _____

Instructions for the Use of Records Inventory Worksheet

- 1. Department, Division, Section:** This information places the records in their organizational setting. Some departments will have no divisional or sectional breakdowns.
- 2. Title of records series:** The series title should be as specific and descriptive as possible. General terms, such as “reports,” “requisitions,” or “correspondence” should be avoided. Examination of the appropriate departmental retention schedules will give examples of various record series titles. For clarity in applying these schedules, the same titles should be used whenever possible.
- 3. Description of records series:** This provision is for information on content, purpose, function, creation, use and other information that will clarify the type of data included in the records series.
- 4. Location of records:** The location should be given as exactly as possible – including the room, file cabinet, shelf, etc. Use separate worksheets for parts of a records series that are found in different locations.
- 5. Earliest date/latest date:** The earliest and latest dates of the records.
- 6. Volume:** Measure how much space the records occupy. Use cubic feet as the measure of volume. (See cubic foot equivalency chart in appendix to this section.)
- 7. Annual accumulation:** The volume of records created annually.
- 8. Arrangement:** Explain how the various records in the series are arranged, whether alphabetically by folder headings, chronologically, numerically, or by some other system.
- 9. Size of records:** The width, height, and in cases of bound volumes, thickness.
- 10. Format of records:** Are the records handwritten, typewritten, or on magnetic tape, audio tape, etc.?
- 11. Reference frequency:** How often are the records consulted? This information is important for establishing the proper retention period for the series.
- 12. Information available elsewhere:** Is the same information found in other records series? This is also important for establishing the proper retention period for the series.
- 13. Microfilmed:** Have the records been microfilmed? If so, what portion of them? What type of microfilm?
- 14. Indexed:** Have the records been indexed? Indicate indexing identification.
- 15. How stored:** Identify the types of storage equipment that are used to hold the records.
- 16. Condition of records:** Are the records in good or poor condition? Explain any problem in their condition, i.e., mold, acid degeneration, discoloration, water damage, brittleness, insect or rodent infestation or damage, etc.
- 17. Records on retention schedule:** Have the records already been schedule for retention/disposition purposes? If not, the individual completing the worksheet should suggest such a retention period (permanent, destroy after five years, destroy after audit, etc.) and provide a justification for the suggested period. This is not the final retention period that will be established, but only a suggestion based on immediate impressions – a suggestion subject to later revisions.
- 18. Condition of storage area:** Is the storage area in good or poor condition? What problems exist (e.g., lack of security, no alarms, not fireproof, high temperature, low humidity, dirt, etc.)?
- 19. Additional comments:** This provision is for any additional comments that the person completing the worksheet wishes to make. Any important information not noted on the worksheet? Any significant research or historical value to the records or parts of them?
- 20. Name of person completing worksheet; date of inventory:** These provisions are self-explanatory.