Is It A Record?

Recorded Information

Are you or your organization the creator of the record? Did you generate or receive the information to use for your technical or administrative work in conducting agency business?

RECORD

NO

Does it contain informational value as evidence of your organization's functions, policies, decisions, procedures, operations, mission, programs, projects, or activities?

RECORD

NO

Is it material that originated in another office or outside your agency, but you commented or took action on the material?

RECORD

NO

Does it document business actions, such as: what happened, what was decided, what advice was given, who was involved, when it happened, the order of events and decisions?

RECORD

NO

Is it an original document related to agency business that does not exist elsewhere?

RECORD

NO

Is it a draft or interim document that has not been circulated to others or does not contain substantive comments and for which there is a final version being maintained?

YES Non-record

NO

Is it published or processed information that you received and use as reference?

YES Non-record

NO

Is it a copy of a document or correspondence kept only for convenience of reference on which no action is taken?

YES Non-record

NO

Is it information accumulated and maintained at the workplace, but which does not affect or reflect the transaction of your program business?

YES Non-record

NO

Is it junk mail or documentation that has no work-related informational or evidentiary value?

YES Non-record

NO

When in doubt, treat it as a record.
Contact your records management team for information.
Is It A Record?

Is it related to agency business or related to your responsibilities at the agency?

Yes

Are you the sender or creator?

Yes

Does it explain, justify, or document an action or decision?

Yes

It’s a record

No

Not a record

Yes

Are you the recipient?

Yes

Do you need to take an action?

Yes

Does it explain, justify, or document an action or decision?

Yes

It’s a record

No

Not a record

No

Not a record

Not a record