



Office of the Chief
Records Officer for the
U.S. Government

RECORDS INVENTORY CHECKLIST

Follow these steps for a successful inventorying project. See the section Guidelines for Inventorying Records for more information.

- ☐ **Define what your agency does.** Identify your agency's functions and organizational structure. Where do the records you need to inventory fit into these functions and structure?
- ☐ **Define your recordkeeping requirements.** Identify what you know to identify where there are information gaps. These gaps can be filled through the inventory process.
- ☐ **Define your goals for the inventory.** The type of information you need to collect will vary depending on your goals. This is also where you may want to identify priorities to figure out where to start first.
- ☐ **Make a plan.**
 - ☐ **Define the scope of the inventory.**
 - ☐ **Determine who will conduct the inventory and how.** Your goals and purpose for your inventory will influence your approach.
 - ☐ **Prepare an inventory form.** Decide on what information will be collected. See the sample inventory forms in the *Guide to Inventorying, Scheduling, and Disposition of Federal Records*.
 - ☐ **Identify where agency records are located.** Include records in all formats and locations.
- ☐ **Obtain senior management support.**
- ☐ **Develop and implement a communication plan.** Make sure that offices involved in the inventory project know about it.
- ☐ **Train staff that will conduct the inventory, if needed.**
- ☐ **Conduct the inventory.**
- ☐ **Verify and analyze the results.** Review the data for obvious errors. Examine inventoried records if data was collected by someone outside the Records Management Program.
- ☐ **Follow up.** Follow-up actions will depend on the goal of your inventory.