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/administrative work in conducting business?

YES

NO

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

YES

NO

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

YES

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?

YES

NO

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

YES

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

NO

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

YES

NO

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

YES

NO

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

YES

NO

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

YES

NO

When in doubt, treat it as a record.
Call your Records Manager for information.

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Courtesy of Anna W. Nusbaum, CRM
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