

Records Management Checklist

1. Does your organization have a current records control schedule on file with, and approved by, the Texas State Library and Archives (TSLA), Local Government Division?
2. Does your organization have a designated Records Management Officer as required by Texas law, and is that person registered with the TSLA?
3. Will your Records Management Officer be able to incorporate the retention schedule updates due later this year into your organization's records management program without extensive keyboarding?
4. Does your organization have a complete records inventory for all of your organization's records, and are you managing these records, *and any electronic images*, in accordance with your records control schedule?
5. Does your records inventory system provide a safeguard method for designating records that are on audit, legal, or historical hold, and preventing the disposal of these records?
6. Does your records inventory system retain a separate list of records that have been disposed of, and does it allow you to retain the actual disposition date as well as the contractor or other details of disposition?
7. Does your records inventory system allow you to keep a record of documents checked out, the date checked out, to whom these were checked out, and the due date for their return?
8. Does your records inventory system allow you to quickly and dependably locate desired records?

If you are using an image management system to scan, index, and access electronic images:

9. Are your image management system image files and index files accessible to your organization independently of proprietary software systems in order to protect your long-term access to your records?
10. Does your image management system allow you to comply with the requirements for electronic records management by Texas Local Governments as specified in the Texas Local Government Code? (see the following items)
 - Does the organization of your electronic images – on optical or other media – allow you to comply with the retention requirements in your records control schedule? *
 - Do your records management plans provide for re-copying optical media as required, and for migration of information as systems capabilities and media compatibility dictate, in order to insure access to images over the retention period of the imaged documents? *

* (See the *Texas Local Government Code* and the Texas electronic records standards for Local Governments for more information.)

If you are in doubt, or can't respond positively, to any of these points, we invite you to contact Intersect Systems Inc. at (972) 641-7747, or at (972) 641-4445, or e-mail us at newintel@newintel.com to schedule a free, no-obligation review and consultation session with one of our specialists.