Records Policy

What is a Records Management Policy

▶ The *Managing Current Records: A Procedures Manual* describes the procedures for managing and maintaining current records.

▶ It also sets out procedures for transferring records to and retrieving records from the records centre once they are no longer in current use.

Policy Manual

- A Guideline

Functions and Responsibilities of a Records Office

- Receive, record and distribute incoming and internally created mail of all kinds (such as letters, memoranda and faxes)

- Open and index files, attach relevant papers and pass the files to action officers

- Build up and control all officially registered files and other documentation in their care, so that they can be produced quickly by means of effective indexing, classification and tracking procedures

- Know the location of all officially registered files in their care and be able to produce them quickly, by means of effective indexing, classification and tracking procedures

- Provide storage, repository and reference services for all officially registered files and other documentation in their care

- Record and arrange for the efficient and timely despatch of all correspondence produced by the officers they serve

- Review and dispose of all outdated files or other records in accordance with retention periods as agreed between the records and archives institution, the organisation or department concerned and other relevant officials.

What Policy Contains: Part 1

1. Defines Records Managemnet in the Context of the Organization

2. Defines the department and relationship with the others

3. Defines the roles of officers within the department

4. Defines their growth

What Policy Contains: Part 2

1. Defines the terminologies
2. Defines documents
3. Defines responsibilities
4. Legal and regulatory aspects
5. Defines and states the Vital Records
6. Defines and States the retention schedule

What Policy Contains: Part 3

1. Defines Audits
2. Defines Process Audits