

TIPS FOR Active & Inactive Records

ACTIVE RECORDS ARE IN REGULAR USE

Active records are documents still referred to frequently during the course of business. Active records are referenced at least once a month, and are usually maintained in a readily-accessible spot in the office space or office systems.

INACTIVE RECORDS ARE INFREQUENTLY USED

Inactive records are no longer used on a regular basis during the course of business. Inactive records may still be required for audit purposes or other uses, but may be stored in less-accessible areas.

CONSIDER RETENTION WHEN FIRST FILING ACTIVE RECORDS

File management usually reflects the business needs of a department, but does not always take into account the retention requirements for the records. Your file plan and methods should make it easy to select those records which are nearing the end of their mandated retention period. Material with different retention periods should not be mixed together in the same folders. For paper records, using different colored folders or folder markings can make this process easier to manage.

An abbreviated retention schedule of record types commonly encountered by university offices (and including links to the complete state schedules and relevant university procedures) is available at: https://www.lib.vt.edu/content/dam/lib_vt_edu/urig/univ_sched.pdf

CONSIDER OFF-SITE STORAGE FOR INACTIVE PAPER RECORDS

Records Management Services operates a University Records Center for offsite storage of inactive paper records. RMS provides reference services for stored records, and manages the destruction process for you. For more information, please contact us at 1-0224 or rec-mgmt@vt.edu.