

How Do I File?

The Problem with Paper

Many of us let our in-trays and our desks pile up with papers. If you are like most people, you have all sorts of reasons for not doing your filing. Maybe you can't find the time. Or maybe you don't know how. Or maybe you just can't be bothered.

The problem with paper is that it can easily get out of hand. Before you know it, you have stacks of paper everywhere and you can't find anything.

Get Organized!

Filing is not hard to do. If you do it regularly, it does not have to be time consuming.

First, find out how your department's filing system works. Your records coordinator will be able to help you with this. Get a copy of your division's file list, a copy of ARCS, and a copy of your division's ORCS.* Also get a copy of your department's filing procedures.

Next, set aside a time every week, or even every day, to do your filing. You might need only half an hour a week to stay on top of your in-basket.

Now you are ready to go. So clear a space on your desk, grab a pencil, and start filing!

ARCS and ORCS

A lot of people look at ARCS and ORCS, and decide that the system is too big and complicated for them to use. In fact, most people only use a few numbers out of ARCS and ORCS to classify and organize all of their files.

Does your desk look like this?



Then it's time to start filing!

* "ARCS" stands for Administrative Records Classification System. "ORCS" stands for Operational Records Classification System.

Your department's records coordinator can help you identify the classification numbers that apply to your records. Make a "cheat sheet" to help you remember the numbers that you need.

Sorting Things Out

Sort your papers before you start to file. Look at each document and decide if it is something that you need to keep – a **substantive** record – or something that you only needed temporarily – a **transitory** record. Bulletin #4 explains the difference between substantive and transitory records.

Put all of the transitory records into a separate pile. Do not throw personal or confidential information in the garbage. Contact your records coordinator for advice on how to get rid of transitory records.

File substantive records in your department's official files.

Filing Substantive Records

Check with your records coordinator to find out if there are department-specific procedures that you should follow.

Follow these steps if you do your own filing.

If someone else does your filing for you, you can help him or her out by following these steps as well.

1. Look over each document and identify its subject matter.
2. Look through your division's file list and find out if a file on that subject already exists. If a file exists, write the file number in the upper right hand corner of the first page of the document.
3. If a file does not exist for the subject, look up the ARCS or ORCS classification number. Write that number in the upper right hand corner of the document.

Cross-References

You may have a document that could be filed into more than one file folder. One solution to this problem is to cross-reference the files.

Write all of the possible file numbers in the upper right hand corner of the document. Place an "X" in front of the file numbers that contain related information.

Example: 1145-30-01
 X 0549-02-03
 X 0549-02-10

The document is filed in the first file folder. A cross-reference sheet is put in the other file folders, to tell you to look in the first file folder for the document.

For more information, contact your department's records coordinator, or contact the Records Management Unit at 920-3009 or 873-7446

For more information...

Check out these bulletins:

- No. 4: What do I file? Part 1
- No. 5: What do I file? Part 2
- No. 9: ARCS
- No. 11: ORCS

Troubleshooting PDF Files

If you are having trouble printing the bulletins, try updating your copy of the Acrobat Reader.

You can get an update at:

<http://www.adobe.com/products/acrobat/readstep2.html>

Follow the instructions on the web page to download and install the update.

If you continue to have problems, call your IT support person. There may be a problem with your printer.

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