

Checklist – Should this be a new file?

When scanning the file list for an appropriate classification, here are useful questions to ask:

1. Do the primary and secondary titles seem appropriate?
2. If you have a file list printout that includes scope notes, does the scope note accurately describe your record?
3. Does the length of time the file will be kept seem appropriate? (retention schedule)

Not sure about some of this terminology? You will find more information about primary and secondary numbers, scope notes and retention schedules as you read through module two.

Consider the following when classifying correspondence:

- Who is it from? Who is it to?
- Did the sender put a file number on it?
- Does the "Re:" or "Subject" line tell you anything about the activity?