

# Four questions before you move a file.

Use this sheet on one real record before you reorganize anything. If you cannot answer a question honestly, that is useful information. Write down what is unclear instead of guessing.

## THE RECORD YOU ARE WORKING ON

FILE OR FOLDER NAME

PROGRAM OR AREA

DATE REVIEWED




## THE FOUR QUESTIONS

| QUESTION                                                 | WHAT YOU ARE DECIDING                                           | YOUR ANSWER |
|----------------------------------------------------------|-----------------------------------------------------------------|-------------|
| <b>1. Owner</b><br>A person, not a team                  | Who is responsible for this record being right and current?     |             |
| <b>2. Status</b><br>Pick one                             | Is it active, closed, replaced, or uncertain?                   |             |
| <b>3. Privacy</b><br>A decision, not the current setting | Who should be allowed to see it?                                |             |
| <b>4. Approved copy</b><br>Only one                      | Is this the version people should use?<br>Where are the others? |             |

**If any answer is unclear, mark the record Needs Review.** Note which question you could not answer. Do not guess, do not delete it, and do not open access to everyone to make it easier to work on.

## WHERE THE RECORD SITS IN ITS LIFE

|                                         |                                         |                                       |
|-----------------------------------------|-----------------------------------------|---------------------------------------|
| Step 1<br><b>Create or receive</b>      | Step 2<br><b>Name it clearly</b>        | Step 3<br><b>Give it an owner</b>     |
| Step 4<br><b>Confirm who may see it</b> | Step 5<br><b>Keep one approved copy</b> | Step 6<br><b>Review or archive it</b> |

## YOUR 30-DAY TEST

1. Pick one program or team, not the whole organization.
2. Agree the folder structure with the people who use it.
3. Use it for thirty days without changing anything else.
4. Review what worked before moving to the next team.

## REVIEW QUESTIONS AT DAY 30

- Could people find what they needed without asking?
- Did anyone make a copy outside the structure?
- Did anything land in Needs Review that should have been obvious?
- What one change would make it easier next month?