



How to file records guide

Step 1 – Obtain white folder label template

Obtain the folder label template by doing either of the following:

- *Click on the label template link under “How to File your records” in the Toolkit **OR**
- Contact University Records (jgduffin@mtroyal.ca)

Folder Labels:

Enter the appropriate filing data into the white folder label template (Avery 05161).

Example:

File Title	VOL #
Retention Code	
Record Code Series [obtained from Retention Schedule]	
Start Date:	End Date:

Or

Doe, John	VOL 1
HR014	
EMPLOYEE RECORDS	
Start Date: Feb 1, 2011	End Date:

Step 2 – Enter appropriate folder data into the label template

File Title:

Enter a general description of what the documents contained within the folder are about.

If the file folder has a designated file number or associated name, this data should be entered in this field first so that all of the folders can be sorted appropriately in your cabinet.

The label has been formatted to allow individuals to sort their folders either alphabetically or numerically based on your preference using the white label as a visual guide.

Placing the File Title **on the top** part of the label ensures that the folders can be physically sorted in your cabinet after the label has been printed and placed on the folder(s).

Always place the volume number of the folder on the far right-hand-side of the field as seen in the white label template. (Example: VOL 1)

File Title Examples:

- Doe, John
- Doe, Jane - Faculty
- BELL TELEPHONE INVOICES 2011
- 190353 CONTRACT #
- 111111111 MRU STUDENT ID #
- Duffin, Jeremy - Student

Doe, John	VOL 1
HR014	
EMPLOYEE RECORDS	
Start Date: Feb 1, 2011 End Date:	

File Code - Retention Code

Enter the alpha-numeric retention code assigned to the folder.

Examples:

- SA008
- HR001
- SS012
- AD003

Doe, John	VOL 1
HR014	
EMPLOYEE RECORDS	
Start Date: Feb 1, 2011 End Date:	

The **Mount Royal University Retention Code Guide** summarizes the alpha-numeric retention codes currently available for the University.

Note: The retention code has been placed near the top to help with sorting

Retention Code Series

Enter the retention code series name (**in Capitals**) that matches the alpha-numeric retention code as prescribed in the Mount Royal University Records Retention Schedule.

Examples:

Assigned Retention Code	Enter the following in the field
SA012	STUDENT RECORDS
SS021	SECURITY
AA012	INSTRUCTIONAL DELIVERY

Doe, John	VOL 1
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Start Date: Feb 1, 2011 End Date:	

Start Date:

Enter the date of the first document that is contained in the file folder.

This date will be printed on the white label placed on the file folder, which can be used to evaluate the age of the folder as time progresses.

Example:

- Jan 4, 2011
- Mar 10, 1901
- Apr 1, 1955

Doe, John	VOL 1
HR014	
EMPLOYEE RECORDS	
Start Date: Feb 1, 2011 End Date:	

End Date:

This field can be left blank until either the folder becomes filled to capacity or the matter of the business activity is formally closed.

Example:

- Jan 4, 2011
- Mar 10, 1901
- Apr 1, 1955

Doe, John	VOL 1
HR014	
EMPLOYEE RECORDS	
Start Date: Feb 1, 2011	End Date:

When closing a folder enter, or write, the end date on the label in order to help make a visual evaluation of the age of the folder.

The end date field consists of the date of the last document placed in the folder.

Upon closing a file folder, place a “**Closed Volume**” sheet in the folder so that no further documents are added to the file.

Step 3 - Print your labels

Print your labels using an Avery 005161 label sheet and place the labels on the folders.

Use the Manual Feed tray – Select Print, go to Properties, then Paper Qualities. In Paper Source, select Manual Feed from the drop-down list.

Step 4 - Place folder(s) in cabinet, shelf, or desk

Use the labels to help your area quickly access the records by grouping the folders alphabetically-numerically by Retention Code and then by File Title.

The dates on the labels can also be used to identify the retention periods for the folders