

U.S. Department of Housing and Urban Development
Office of Administration-Administrative and Management Services
Document Division

FILES MANAGEMENT

GUIDE

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PREFACE

This guide provides instructions on filing, maintaining and retrieving HUD records. The real test of filing operations is how quickly and accurately records can be found when requested. If file custodians can not produce records when needed, the file station gets a reputation for unreliability. Users may create and maintain duplicate files if lacking confidence in the official files.

This guide provides a general subject file classification guide for HUD Offices to use to prepare office subject outlines for arranging their subject files.

This guide will give you information to:

- A. Make filing official records as easy and uniform as possible by standardizing filing classification schemes.
- B. Allow for similar files kept at different locations to be merged later if necessary.
- C. Formally authorize official file locations and prohibit keeping file at other locations.
- D. Standardize reference service procedures to aid in finding, charging out and refiling records.
- E. Reduce storage and retrieval problems by requiring daily filing.
- F. Standardize, as much as possible, the equipment and supplies used in filing and reference service operations.
- H. Prevent-the unauthorized, long-term storage of records in temporary staging areas, such as the subbasement of the HUD Headquarters building.
- I. Cut filing errors and identify training needs by regularly checking samples of the files for duplication, misclassification, or misfiles.
- J. Set up and keep files in a way that makes it easier to dispose of records using records disposition schedules.

Provides instructions on handling and storing electronic media such as diskettes (par. 2-21), but does not cover the indexing or retrieval of

electronic records. For information on indexing and retrieval, see:

1. General Services Administration (GSA) handbook Electronic Recordkeeping, dated 1989.
2. National Archives and Records Administration (NARA) guide Managing Electronic Records, dated 1990.