

Records Inventory Worksheet

Dear Reader:

The following document was created from the MTAS website ([mtas.tennessee.edu](http://www.mtas.tennessee.edu)). This website is maintained daily by MTAS staff and seeks to represent the most current information regarding issues relative to Tennessee municipal government.

We hope this information will be useful to you; reference to it will assist you with many of the questions that will arise in your tenure with municipal government. However, the *Tennessee Code Annotated* and other relevant laws or regulations should always be consulted before any action is taken based upon the contents of this document.

Please feel free to contact us if you have questions or comments regarding this information or any other MTAS website material.

Sincerely,

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Table of Contents

Records Inventory Worksheet	3
-----------------------------------	---

Records Inventory Worksheet

Reference Number: MTAS-711



RECORDS INVENTORY WORKSHEET

City/Town, etc. _____ Number _____

1. Department _____ Division _____ Section _____

2. Name and title of officer immediately responsible for series _____

3. Records series title _____ 4. Series number _____

5. Description of records series (content, purpose, by whom created, form numbers, etc.) _____

6. Earliest date/Latest date _____ 7. Records still being created? Yes No

8. Annual accumulation _____ cubic feet

9. Arrangement: Alphabetic by _____ Numeric by _____ Other _____

10. Reference frequency (check, insert number, circle appropriate words)

_____ times daily, weekly, monthly, annually for _____ months, years.

Never after _____

11. If there are other copies of these records, including microfilm, identify them. _____

12. Relationship to other records series (indexed, summarized, listed, etc.) _____

13. Location of records (building, room, file section, etc.) _____

14. Volume _____ cubic feet

15. Size and format of record _____

16. Type and quantity of file equipment occupied _____

17. Statutory or state archival requirements for retention _____

18. Suggested retention period with justification _____

19. Additional comments _____

20. Inventory taken by and date _____

21. Reviewed by/date _____

22. Appraisal Confirms suggestion retention period or Substitutes following _____

23. Department head and date _____

24. Records officer and date _____

25. Other local authority and date _____

26. State archivist and date _____

From H.G. Jones, *Local Government Records: An Introduction* (Nashville: American Association for State and Local History, 1979) as it appeared in *Managing Records On Limited Resources — A Guide for Local Governments*, Stephen E. Haller, CRM, issued by NAGARA (November 1991). Local officials are welcome to reproduce this worksheet. This constitutes formal permission from author and publisher for its reproduction, with proper acknowledgment to source.

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