

## RECORDS MANAGEMENT PROGRAM

As in previous years, emphasis in records management was placed on records retirement, though records creation and records maintenance received some attention.

The records survey program, aimed at developing retention and disposal schedules and clearing out accumulations of old records, made appreciable progress in both State and local agencies. In the course of the year, surveys were conducted in twenty-one State agencies. For the most part they included either all the records of an agency or those of major departmental divisions or institutions. In a few cases, however, the surveys were limited to specific record series because of the urgent need for additional space. On the basis of the information obtained in each survey, control schedules were established providing for the orderly retirement of the records. These schedules, together with those established in previous years, now govern approximately eighty-five per cent of the holdings of all State agencies.

Because so many of the functions and operations of State agencies require complete documentation on individuals, case filing is extensively used. In many instances, case files were found to contain documents of both temporary and long-term value. When this situation was found to exist, the schedules listed the documents that should be retained or destroyed. In the case of the Department of Mental Hygiene, where the patients' case files at its several hospitals are kept on dissimilar forms, the schedule recommendations were by category of record rather than by title of form. Filing procedures also were recommended which should facilitate the disposal of documents of temporary value. By reducing the contents of case files and even eliminating the filing of some material of short term value, it was possible in some cases to increase the efficiency of these files.

A similar problem was encountered in the subject files maintained by many agencies. Documents that have significant historical and research value are intermixed with documents of short-term value. To control the size and value of these files, a weeding or screening process must be performed. Insofar as practical, the types of documents that should be retained permanently were listed and the remaining documents were scheduled for periodic disposal. A planned program for the filing of current records was developed in a number of agencies to simplify their future screening. However, screening was not recommended when the percentage of documents that could be eliminated would not justify the expense and effort expended.