Instructions for Completing the Records Locator Inventory (RM-20 Form)

The purpose of the Records Locator Inventory (RM-20 Form) is to identify and quantify all records created and maintained by your agency or locality. The survey identifies the type of records maintained, applicable schedule and records series numbers, storage location, date range of records, record format, and record volume.

The RM-20 Form will allow your agency to determine what documents you currently maintain and where they are located. The form should be used to inventory all documents, both records and non-records, regardless of format, retained by your agency. This includes records maintained in paper, electronic, and microform formats, or on CDs and flash drives. Be sure to inventory all records, including those maintained off-site in a records center or commercial warehouse.

In order to complete the survey, staff will need to examine their records, including those in file cabinets, shared drives, local drives, and records storage rooms. This does not necessitate reviewing every individual document in the office, but rather identifying the general categories of documents maintained. Individual staff members should be responsible for inventorying their own records.

The final step to completing the form is to identify the appropriate General or Specific Records Retention & Disposition Schedule and records series. This will allow you to discard non-records as well as recognize and destroy records that have passed their retention period.

The RM-20 is not to be submitted to Records Analysis Services, but rather is for internal office use only.

Instructions

Agency/Locality: Identify the agency or locality for which the inventory is being completed.

Division/Section: Identify the division or section within the agency or locality whose records are being inventoried.

Schedule and Series Number: Using the General and Specific Records Retention & Disposition Schedules, identify the appropriate schedule and series numbers.

Records Series Title or Type: Identify the type of record or common title. This may be the title as it appears on a records schedule, or the title by which the record is commonly called in the agency.

Location: Provide the records storage location. This may be in a paper filing cabinet, on a roll of microfilm, or stored on a CD.

Date Range: Provide the dates of the records from the earliest to the most recent. Use approximate dates when exact dates cannot be determined.

Format (paper, film, electronic): A particular records series may include multiple formats. Indicate all formats that apply. Paper records can include loose documents, bound volumes, photographs, architectural drawings, and maps. Electronic records can include word-processed files, databases, electronic spreadsheets, geographic information system (GIS) records, and computer-aided design (CAD) records. Audiovisual records can include information stored on audio and video tapes, compact discs (CDs), and digital video discs (DVDs).

Approx. Volume: Provide an estimate of the volume of records. Express the approximate volume of records in cubic feet where possible. For a point of a reference, a records center box of 12” x 15” x 10” is one cubic foot. When inventorying electronic, audiovisual, microform, cartographic, and related records, also provide an item count (e.g., 1200 prints, 3500 negatives) where appropriate.

Record, Non-Record, or Reference: Identify whether the documents being inventoried are records, non-records, or reference material.

Inventoried By: Enter the name of the person who completed the survey form.

Telephone Number and Extension: Enter the telephone number and extension of the person who completed the survey form.

Inventory Date: Enter the date the survey form was conducted.