

Management of Records

Good Practice for Corporate Records Management

Table One



Creation

- the organisation should aim to create good records in an effective and managed system
- a common format for the creation of records will ensure that they are able to be retrieved more easily

Naming conventions

- each record to have a unique and meaningful name that closely reflects the records content
- elements of the name to be in a structured and predictable order
- use the most specific information at the beginning of the name with the most general at the end
- records which are linked should have similarly structured and worded name

Filing structure

- a clear and logical filing structure that aids retrieval of records should be used, ideally reflecting the way in which paper records are filed for consistency
- primary records should not be filed to local drives / desktops but within a structure on the shared network

Retention and disposal

- the practice should consider including a local retention and destruction process within their procedures. Further guidance on the retention and destruction of information can be found in the [Records Management Code of Practice for Health and Social Care 2022](#)
- the [Public Records Act 1958](#) details Places of Deposit for records which should be transferred to, rather than be destroyed

Training

- staff should be informed how to create corporate records in a common format