

## Electronic Filing Tips

Technology has made it easier to store information but that doesn't necessarily mean it has made it easier to manage records. Now more than ever, it is vital to set up efficient filing systems so you know where and how records are being kept and to purge records which have met their retention times.

### **Some things you can do:**

- Follow your approved records retention schedules, retain and purge as specified
- Delete non-retention (non-record) material
- File at least 10-15 minutes every day or set up a regular filing schedule
- Have consistent file naming conventions
- Create folders within folders – for example, you might have subfolders listing years
- Give files logical names – try to be specific so you know what the folder or document is without opening it
- File as a document is created OR create general subject folders to send files to or tag emails by category as you open them. This will give you a start towards your filing scheme which you can then have more control over.

### **Folder Examples from PUC**

These are broad categories intentionally...in other words, Correspondence, for example, will have subfolders unique to the area where the employee works.

#### General Records:

- Finance (Budget / Accounting / Billing etc.)
- Contracts / Vendors / Purchasing
- Correspondence
- Equipment and Inventory
- FOAA
- Meeting Minutes
- Personnel and Payroll
- Policy and Procedures (MPUC or from other state agencies)
- Other

#### PUC-unique Records:

- Docketed cases (NOI, Rulemaking, Utility Cases, 10 person complaints)
- Electric
- Gas
- Telephone
- Water
- E-911
- Administration
- Legal
- Industry Associations (ISO, NARUC, NECPUC, IHS, etc.)