

PAPER RECORD KEEPING TIPS

- A. **WRITE WITH PENCIL – IT LAST LONGER THAN INKS, AND PERMITS EASY CORRECTIONS.**
- B. **STORE RECORDS IN 3-RING BINDERS – ALLOWS EASY ADDITIONS AND CHANGES - SEPARATE BY:**
 - 1. **COMPLETED DATA FORMS**
 - 2. **INDEX SHEETS**
 - 3. **NUMBERED REFERENCE DOCUMENTS**
 - 4. **CORRESPONDENCE**
 - 5. **GENERAL HISTORICAL MATERIALS**
 - 6. **“PENDING”**
- C. **CONVERT ODD SIZE RECORDS TO 8-1/2” x 11” SIZE - MANAGEABILITY**
 - 1. **SHRINK LARGE SIZES BY REDUCTION PHOTOCOPYING**
 - 2. **TAPE SMALL DOCUMENTS TO 8-1/2” x 11” COPY PAPER**
 - 3. **INSERT CRITICAL DOCUMENTS INTO SHEET PROTECTORS**
 - 4. **DO NOT TAPE OVER TEXT OF DOCUMENTS – TAPE FADES OR ABSORBS PRINTED MATERIALS OVER TIME**
- D. **CATEGORIZE & NUMBER CODE EACH DOCUMENT – ADD NEW CATEGORIES OR CONTRIBUTOR SOURCES TO INDEX AS REQUIRED**
 - 1. **NOTE DATE RECORDS ADDED TO COMPLETED FORMS**
 - 2. **FLAG WITH “POST-IT” NOTES ITEMS OF UNCERTAINTY FOR FUTURE ACTION**
- E. **KEEP A “PENDING” FILE AND A “TO-DO LIST” FOR RECORDS IN PROCESS, OR NOT YET IDENTIFIED BY CATEGORY**
- F. **REMEMBER – EVEN IF YOU ARE DOING THIS JUST FOR YOUR IMMEDIATE FAMILY, RECORDS WILL GROW FAR BEYOND YOUR INITIAL EXPECTATIONS – PLAN AHEAD FOR THE FUTURE**
- G. **KEEP IN MIND – YOU ARE DOING THIS FOR OTHERS TO FOLLOW – MAKE SURE THEY CAN UNDERSTAND WHAT YOU ARE LEAVING FOR THEM**
- H. **MANAGING UNCERTAINTY – MINIMIZING THE SPREAD OF INACCURACY**
 - 1. **NOTES OF CAUTION TO THOSE WITH WHOM YOU SHARE RECORDS**
 - 2. **USE OF “ABOUT” OR “?”, OR BLANK PLACES – DON’T RECORD GUESSES**
 - 3. **HANDLING CONFLICTING NAMES AND DATES**
 - 4. **IDENTIFYING UNKNOWN PEOPLE AND DIFFERENT PEOPLE WITH IDENTICAL NAMES**
- I. **TRY TO BE ORGANIZED – EVEN IF IT DOESN’T COME NATURALLY !**