



**Tip Sheet: Designating the Official Recordkeeper**

Managers and supervisors need to set expectations about who is responsible for recordkeeping and how records will be managed. Good management of records includes:

1. Identifying where records will be stored (aka “system of record”)
2. Establishing recordkeeping rules that promote consistency
3. Designating the official recordkeeper(s)
4. Ensuring compliance with records Retention and Disposal Schedules

**The *official recordkeeper* is the employee responsible for filing and maintaining the essential records of a business process or activity.**

In general, the lead employee or project manager is the official recordkeeper, because they are responsible for creating and receiving records, as well as getting them approved. If multiple employees serve as the lead on or have a significant role in assigned projects, then each of them could be responsible for filing records. However, other employees could be the official recordkeeper if they are designated by their supervisor or a team, or if they are the only employee with the records. Employees who are *not* the official recordkeeper should *delete* redundant, obsolete and trivial (ROT) documents when they no longer have reference value.

Managers and supervisors who have not designated an official recordkeeper should:

- Identify the business processes or activities that they supervise, and the records that are created to document the work performed
- Analyze employee job responsibilities, workload, experience, skills, and other factors prior to assigning recordkeeping duties
- Talk with the group or team involved in a process or activity to identify the designated recordkeeper(s)
- Create standard operating procedures to document recordkeeping responsibilities
- Communicate with employees who are assigned recordkeeping duties to ensure they understand what is expected
- Ensure that employees with recordkeeping responsibilities are properly [trained](#) and have appropriate resources to do the job

