

**State of Michigan  
Records Management Services**

**Guide: Naming Records**

Naming conventions for files and documents promote consistency, which makes retrieval much easier. Office procedures may be needed to define the authorized terminology or formatting of names.

**Naming Tips:**

- Names should be unique, so there is no confusion about the content and purpose of the records.
- Name the record based upon the information that users generally have about the content, so they don't have to refer to an index to locate it.
  - Example: "General Hospital License" instead of "Hospital License #34567"
- Assigned numbers or codes can be useful when the records are voluminous, or when there is a need to protect sensitive information. When using assigned numbers or codes, create an index to help with retrieval.
- When using numbers, know the maximum number of digits to be used and insert zeros as placeholders, so files sort correctly.
- Consistently use abbreviations, shortened names, acronyms, uppercase and lowercase characters, etc.
- If a person or business changes its name, determine how/when/who will modify the name on the documentation.
- Names may need to identify a document type, form number, name of "subject," date, etc.
  - Example: "General Hospital License" or "General Hospital Complaint"
- If electronic, don't spell out months, use numbers to represent dates.
- It is useful to identify drafts versus final versions in document names.
- Use default application extensions for electronic documents, so the computer can open them.
  - Example: s:\Hospital Licensing Files\General Hospital\General Hospital License 2015.pdf