

# Vital Records Guide



*This guide will help you collect, organize, store and protect records vital to your operations.*

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Steps 1-3 should be completed during the planning phase and updated regularly.

## 1. Identify Vital Records

- » Customize the *Vital Records Worksheet* and use it to identify key records.
- » Identify information that must be readily accessible to perform essential functions and support emergency systems.

## 2. Gather Vital Records

- » Use the *Vital Records Worksheet* to assemble information and track existing documents.
- » Print documents that only exist electronically, and scan or digitally photograph documents that only exist as hard copies.
- » Copy records to USB drives and provide them to one or two senior staff members. The USB drives should be protected with a password or encrypted to protect data.

## 3. Store Vital Records

- » Work with the **IT Team Leader** to ensure all your records and storage systems are up to date. Establish timelines for backing up records.

### Physical Records

- » Keep two sets of physical documents in different locations. The backup location should be offsite in a secure facility.
- » Protect physical documents from threats specific to your location and circumstances. These threats may include fire, theft, structural failure of buildings, flood and rodents.

### Digital Records

- » Store drives and disks in insulated and waterproof containers.
- » Work with the **IT Team Leader** to store electronic backup data on a cloud server or in a secure offsite facility.

