



Vital Records Worksheet

This worksheet will help you prioritize your list of vital documents. This recommended list should be customized to fit the needs of your organization, and updated at least once a year.

Building Information

Building Plans "As-Builts"

Recommendations: Work with the **Housing Chief** to assemble digital and hard copies of building plans. If your as-builts are not accessible or do not exist, sketch layouts of floors and locations of all critical equipment such as utilities and connections.

Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	

Equipment Inventory

Recommendations: Include receipts for purchases. Ask the **Building Protection Team Leader** for the *Building Equipment Inventory Worksheet*.

Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	

License and serial numbers list for IT/telecommunications equipment and software

Recommendations: Ask the **IT Team Leader** for the *IT Continuity Checklist*.

Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	



List of Passwords for Computers, Buildings Security and Accounts

Recommendations: This list should be protected by password and made only available to one or two senior staff members.

Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	

Receipts of Major Equipment Purchases Made in the Last Five Years

Recommendations: Check with your funders and accountant on how long you should retain documentation on purchases.

Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	

Current Insurance Policies

Recommendations: Store *Insurance Coverage Worksheet* and attached policies.

Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	

Property Records and Property Owner Information

Recommendations: Include deeds, loan documents, investor agreements, permits, and certificate of occupancy for each building in your portfolio.

Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	

Notes			
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Staff Information

Employee Contact Information			
<i>Recommendations: Ask the Human Resources Team Leader for contact lists and contracts.</i>			
Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	

Volunteer Information			
<i>Recommendations: Ask the Human Resources Team Leader for the <i>Volunteer Agency Tracking Sheet</i> and other associated documents.</i>			
Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	
Notes			

Vendor Information

Vendor and Partner Contacts			
<i>Recommendations: Ask the Building Protection Team Leader for the <i>Critical Vendor Contact List</i> and include the <i>Vendor-Partner Contact List</i>.</i>			
Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	

Vendor Contracts			
<i>Recommendations: Compile all vendor contracts in one place for easy access during an emergency.</i>			
Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	
Notes			



Resident Information

Resident Surveys			
<i>Recommendations:</i> Ask the Housing Chief for all <i>Resident Surveys</i> and associated documents.			
Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	
Notes			

Legal

Court documents			
<i>Recommendations:</i> Compile all legal documents related to open enforcement actions, active court cases, and development-related items.			
Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	

Organizational Information			
<i>Recommendations:</i> Include by-laws, certificates of good standing, incorporation documents and most recent audit.			
Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	

Tax Identification Information			
<i>Recommendations:</i> Include tax identification numbers for your organization and each building entity.			
Document Location-Physical			
Document Location-Electronic		Format (eg: .doc, .pdf)	
Notes			