

## DEVELOPING RECORDS RETENTION SCHEDULES

Every organization needs a records retention schedule--it's a fact of life. Whether you are using electronic records, paper records, or a hybrid of the two, the challenge lies in creating a schedule that covers all the regulatory and legal requirements, and then applying it to all your records management functions.

Researching and developing your retention schedule can be a time-consuming process, requiring deep RM knowledge to get it right. The situation becomes even more complex if you need to apply it to RM software or an electronic content management system.

That's where TAB comes in. We take a holistic approach to your RM program, and retention schedules are a fundamental part of that approach.

### The TAB Process

Here's a quick overview of what an engagement with us looks like:

- Start with extensive legal research into the legal requirements that pertain to your business activities and resulting records
- Evaluate legal citations and operational requirements
- Apply retention periods to activities identified in your functional classification system
- Retention schedule is then mapped to the classification system, allowing us to identify all your records



- Comprehensive programs simultaneously developed outlining everything from:
  - Duplication and dispersal requirements
  - Storage and access restrictions
  - Eventual destruction of records no longer deemed vital as outlined by a retention schedule

If you'd like our help in developing a retention strategy and schedule that will identify the records that need to be kept, how they should be stored, and when you can legally dispose of them, contact your local TAB representative.

### About TAB

As the recognized leader in the records and information management industry, we develop custom solutions that enable our clients to control, store and access critical information. We offer top quality filing systems, media storage equipment and specialists that solve complex records and information management challenges. With more than 60 years of experience, we serve clients in a variety of industries including legal, finance, healthcare, insurance, manufacturing, education and government.



CONTACT ONE OF OUR REPRESENTATIVES TODAY.

UNITED STATES	• 888.822.9777	<a href="http://www.tab.com">www.tab.com</a>
CANADA	• 800.387.6212	<a href="http://www.tab.ca">www.tab.ca</a>
AUSTRALIA	• 800.50.3453	<a href="http://www.datafile.com.au">www.datafile.com.au</a>
EUROPE	• +31 20 6975333	<a href="http://www.tab.nl">www.tab.nl</a>