# Records management RMGT

Planning, implementing and managing the full life cycle of organisational records.

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| **Guidance Notes:**Specific laws and regulations may require organisations to maintain records of certain activities and transactions. Records are typically subject to specific life cycle management activities that include retention, disposal requirements and potentially other controls.Records are held in many forms including, but not limited to, digital documents, printed material, microform, e-mail, chats, and may be generated by internal or external sources.Activities may include, but are not limited to:* identifying, classifying, valuing, processing, storing, archiving, destroying information and records
* capturing and maintaining evidence of and information about business activities and transactions in the form of records
* implementing systems of cataloguing, metadata, indexing, and classification standards and methods used to identify and organise records
* ensuring compliance with legal obligations
* management of records management systems
* conducting searches for records to comply with internal or external requests
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## Level 1

Follows detailed guidance to acknowledge receipt of records, including the capture of essential metadata.
Delivers digital and physical records in line with agreed procedures.

## Level 2

Assists in the collection, delivery, and retention of records.
Identifies and applies correct metadata.
Uses established methods to transform records between formats or media, following organisational policies and procedures. Remains aware of potential issues when handling information.
Performs administrative tasks to ensure accessibility, retrievability, security, and protection of records.

## Level 3

Maintains key metadata for records, including ownership and category information.
Configures routine controls to ensure only approved actions are performed on records.
Conducts routine searches for records needed to support authorised requests. Supports users in finding and accessing records.
Uses ethical and reliable methods to transform data between formats or media, following organisational policies and being aware of potential issues when handling information.

## Level 4

Supports the implementation of records management policies and practices including the approved disposal of records.
Conducts complex or sensitive searches for records to address authorise requests.
Monitors and reports on the implementation of effective controls for records management including metadata and access controls.
Recommends remediation actions as required.
Provides advice and guidance to enable good records management practices to be adopted across the organisation.

## Level 5

Ensures implementation of records management policies covering all aspects of retention and disposal.
Authorises access to records and searches for records.
Approves the release of potentially sensitive records, seeking legal guidance where needed.
Reviews new change proposals and provides specialist advice on records management.
Assesses and manages records-related risks.
Contributes to the development of policy, standards and procedures for compliance with records-related legislation.