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

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.