Avoiding Misfiled Records

Few things raise the stress level in an office more than when a file goes missing. Looking for information that is not where it belongs wastes valuable time and is highly disruptive. One lost or misplaced record can often delay, inconvenience or cause work to be redone by more than a dozen people. As other people are enlisted to help locate the missing file, anxiety spreads among the entire office staff and productivity grinds to a halt.

EVERY FILE HAS ONLY ONE HOME

The easiest way to avoid this unneeded stress is to make sure each file has only one place where it belongs. Numeric indexing works best because there is only one place that a number fits into a sequence. Alphabetic systems require users to make a judgment for the proper location of files with headings starting with the word “the”, or salutations in people’s names such as “Dr.” Other naming conventions must be understood by all users of the system in order to prevent misfiles.

USE COLOR AS AN ALERT

By including color-coded letters or numbers on a folder’s label, the likelihood of filing it in the wrong place is greatly reduced. When folder tabs are lined up in a drawer or on a shelf, the color codes form bands of color for files beginning with similar headings. A misplaced file breaks the color pattern and draws attention to itself so it can easily be refiled in its proper location.

LOST, OR BEING USED BY SOMEONE ELSE?

Just because a folder is not in its place in the filing system does not mean it has been lost or misfiled. It may just be in use by someone else. An easy way to avoid panic among staff is to insert an “OUT” Guide whenever a folder is removed from the filing area. Out guides act like bookmarks to show where folders have been taken from the filing system. Sign-out forms on the out guide let others know who has taken the file and when it will be returned.

When files are returned to the system, out guides quickly signal where they belong, greatly reducing the chance of them ending up in the wrong location.

RAISING THE BAR ON FILE TRACKING

Large filing systems with many users often turn to bar code tracking to manage file usage. Folders are checked in and out of the system by scanning a bar code on their labels. File tracking software provides real-time information about all files, whether they are in use, in the filing system or even if they have moved to archive storage or have been destroyed.