

DEPARTMENT OF THE ARMY
ACADEMY OF HEALTH SCIENCES, UNITED STATES ARMY
Fort Sam Houston, Texas 78234-6100

AHS Memorandum
No. 25-6

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Information Management
FILES EQUIPMENT

1. **PURPOSE.** To establish procedures for planning, directing, controlling, and approving the Files Equipment Management Program within the Academy of Health Sciences, U.S. Army (AHS). This memorandum prescribes procedures to acquire standard and nonstandard filing equipment.

2. **APPLICABILITY.** The provisions of this memorandum apply to all personnel assigned to or on duty within AHS. The Commander/Dean of the U.S. Army Medical Equipment and Optical School, and the Dean, U.S. Army School of Aviation Medicine are encouraged to adopt these or similar procedures within their respective activities.

3. **REFERENCES:**

- a. AR 25-1, The Army Information Resources Management Program.
- b. AR 25-400-2, The Modern Army Recordkeeping System (MARKS)
- c. AR 71-13, The Department of the Army Equipment Authorization and Usage Program.
- d. CTA 50-909, Common Table of Allowances.
- e. SB 700-20, Army Adopted/Other Items Selected for Authorization/List of Reportable Items.

4. **TERMS:** The term "files equipment" includes all files containers, machines, devices and furniture for maintaining and servicing all documents falling under the MARKS. The MARKS covers all recorded information, regardless of media or characteristics, made or received and maintained in pursuance of an organization's legal obligations or in transacting business. Filing equipment is divided into two categories:

- a. Standard files equipment. These are standard items of issue that have been accepted for Army use and can be requisitioned through normal supply channels. This equipment is listed in the Common Table of Allowances 50-909, 50-970 and Supply Bulletin 700-20, e.g.:

(1) Five drawer containers that are to house letter or legal size correspondence.

(2) Safe

(3) Security cabinets.

(4) Keylock cabinets.

b. Nonstandard files equipment. Commercial items which have not been type classified by Department of the Army, e.g., electronically powered filing equipment or automated filing systems.

5. EXPLANATION OF TERMS AND DEFINITIONS:

a. Standard filing cabinet. A five drawer conventional, upright nonsecurity-type unit.

b. Correspondence cabinets. Correspondence cabinets are two-, three-, four-, and five- drawer containers that are letter or legal size. Legal-size cabinets will not be used unless at least 25 percent of the material to be filed is legal size or larger.

c. Safe. A container used to store items of monetary value and other nonsecurity items that require protection.

d. Security cabinets. Cabinets bearing a label issued by the General Services Administration (GSA) that shows approval for use as security containers for storing classified defense information. Security cabinets are approved by GSA in accordance with AR 380-5, para 5-100.

e. Open-shelf file cabinets. Open-faced, shelf-contained cabinets, with metal dividers, with or without doors, used to maintain active records in current files areas.

f. Specialized power-retrieval devices or motorized elevator units. Electrically powered or motorized elevator units, controlled by keyboard or tape input, used to retrieve data.

g. Conventional files equipment. Conventional files equipment may be used instead of security containers in approved security areas.

h. One-drawer file cabinets. One-drawer file cabinets will be used for unclassified files. They can be stacked and also used to transport files, including movement overseas. The basis of issue is one per 2 linear feet of current records.

i. Mobile file pedestals. Full suspension file drawer and accessory drawers, with lockable casters, used to accommodate letter size documents. May accommodate standard manila folders or hanging folders.

j. Modular sliding door/open drawer cabinets. Hang-on or stationary cabinets that are affixed to office panels utilized to store information. May accommodate standard manila folders or hanging folders.

6. **CLASSIFIED MATERIAL:** Classified material will be stored per security regulations. When practicable, containers will be used jointly. Unclassified material will not be stored in these containers except when-

a. The record of an action or a subject area consists of both classified and unclassified documents and it is essential that they be kept together. The interfiling of classified and unclassified documents is restricted to papers that support, explain, or document the action or subject area.

b. A small volume of classified material is on hand and it is advantageous to use otherwise empty drawers for unclassified material. However, the classified material will be separated from the unclassified material by guidecards or by placement in separate drawers.

c. Accountable items will be stored in security containers.

7. RESPONSIBILITIES.

a. The Records Management Officer (RMO) will:

() Plan, develop, and manage files equipment management.

(2) Control the use of files equipment to prevent unnecessary acquisition and misuse.

(3) Ensure that requests for new equipment are fully justified by reviewing and validating all requirements.

(4) Ensure the following steps have been taken by the requestor to determine if new, old, or additional equipment needed:

(a) Eliminate unnecessary files material.

(b) Destroy all documents eligible for destruction.

(c) Transfer all eligible records, to a records holding area or retired to a Federal Records Center.

(d) Utilize all space in filing cabinets, security containers, shelf files, and other files equipment. Drawers should be filed to three-fourths full. Combine contents of cabinets and safes that are less than half full.

(e) Store all stocks of forms, publications, and office supplies in open shelf files, warehouse-type shelving, storage cabinets, and similar equipment, not in filing cabinets.

(f) Utilize all existing filing equipment. Filing equipment is not a status symbol and is not to be used for personal items, coffee supplies, Christmas decorations, etc. A standard legal size filing cabinet takes up 8 square feet and a map filing cabinet takes up 30 square feet.

Ensure that maximum cost effective use is made of files equipment.

(6) Ensure that user needs are adequately supported.

(7) Ensure that Army personnel benefit from the most economical and modern office equipment available that is necessary to perform mission requirement.

(8) Perform an on-site survey.

(9) Approve or disapprove requests for standard files equipment. Approvals are sent to Logistics and disapprovals are returned to requestor.

Nonstandard filing equipment.

(a) Review the proposal to ensure that the request is cost beneficial as shown in the cost analysis provided in the proposal.

(b) Ensure that two or more types of filing equipment are considered in the proposal.

(c) Provide a brief narrative to support approval as part of the review.

(d) Proposals determined not to be cost effective will be returned to the requestor for further justification or consideration of alternatives.

(11) Reassign or redistribute excess filing equipment within the activity to meet essential needs.

Approve/disapprove the turn-in of all filing equipment.

(13) Maintain an inventory on both standard and nonstandard filing equipment.

b. Office Chiefs will:

(1) Prior to submitting a request for filing equipment ensure:

(a) That items stated in paragraphs 9a or 9b are included in each request for files equipment.

(b) That an on-site survey is performed to determine if request for new or old equipment is valid. Consider the following: Is existing file cabinets bulging? Do they harbour records that could be destroyed; e.g., is reference material no longer needed or used; are superseded or rescinded copies of directives, notices, procedures, or manuals maintained; are duplicate records being maintained; are documents filed that should have never been filed;

(c) That records are being transferred and/or retired in accordance with AR 25-400-2 or DA Pam 25-400-2.

That records authorized for disposal are being destroyed.

That file folders are not prepared in advance of need.

(f) That office supplies, forms and items of personal nature are not stored in file equipment.

That the proper equipment being requested meets user requirements.

(h) That excess filing equipment is reassigned or redistributed to meet essential needs with the RMO approval.

(2) Notify the RMO upon receipt of new files equipment or prior to turn-in of files equipment.

8. EXEMPTIONS. This memorandum covers all filing equipment except those listed below:

a. Files equipment used to house publications and blank forms stocked for filling requisitions.

b. Equipment used to store reference materials and books in formally organized and officially designated libraries.

c. Security file cabinets used to house small arms, drugs, classified material of missile systems, and cryptographic equipment.

9. ACQUISITION PROCEDURES.

a. Standard files equipment. As a minimum, requests for acquisition will include:

(1) Background information identifying the problems, conditions, or reasons leading to the request.

Present volume of files to be housed in the requested equipment.

(3) A description of present equipment, including quantity and condition.

(4) Number of persons accessing files, and total day manhours required to perform filing function.

Proposed equipment.

Stock number, nomenclature, document size, quantity and price.

(7) A valid justification of essentiality, since new equipment does not necessarily increase productivity or save labor.

b. Nonstandard files equipment. Approval letters authorizing acquisition of nonstandard filing equipment will be maintained IAW AR 25-400-2 by the RMO and users will maintain a copy of the approval documents. Electronically powered filing equipment or automated filing systems require approval. Before completing justifications for this type of equipment, two or more types of filing equipment will be compared for suitability. The justification must include:

Operation.

(a) Description of files, MARKS numerical designation, and document size

(b) Detailed description of the basic file operations, such as filing, posting, searching, indexing, or other actions, to include the average total daily work units per person.

(c) Present volume of files to be housed in the requested equipment, expressed in linear feet.

(d) Whether an expansion in volume is anticipated and if so, an estimate of the annual net increase in linear feet.

(2) Present Equipment.

(a) Description of present equipment and its condition, including accessories.

(b) Number of persons and total daily staff hours required to perform filing functions.

Total maximum capacity expressed in linear feet.

Proposed Equipment.

(a) Complete description, including accessories or optional parts. A copy of, or extract from, the manufacturer's catalog or brochure must be included.

(b) Number of persons and anticipated total daily staff hours required for the operation.

Total maximum capacity expressed in linear feet

(d) Benefits or savings anticipated from proposed equipment and the basis upon which calculated.

Unit and total cost.

(4) Space. When space is a significant factor, and when motorized equipment is proposed, the request will include a 1/4 inch scale drawing showing the floor plan, overhead obstacles, electrical outlets, location of files equipment, and desks of personnel using the files, for both existing and proposed equipment when construction or room modification are required. Details and cost will be explained. Weight-load of equipment should be taken into consideration.

(HSHA-MPR)

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