

## **5 FAH-3 H-600 MANUAL FILES SYSTEMS**

*(CT:TAGS-32; 03-28-2007)*  
*(Office of Origin: A/ISS/IPS)*

### **USING TAGS/TERMS IN FILING**

*(CT:TAGS-32: 03-28-2007)*

#### **GENERAL**

All subject files should be filed according to the TAGS/Terms System described in this handbook. This system covers centralized and decentralized files. Some records, such as official personnel files, may not be appropriate for subjective filing. In this case, alphabetic or numeric filing schemes are acceptable.

Offices in the Department may find that they will be using a few TAGS or other headers (e.g. Personalities and Organizations) which are relevant to their particular office programs, but will expand on the use of the terms to further refine filing. Conversely, posts may use more TAGS to cover the variety of information coming to them from the various offices in the Department, and fewer terms.

#### **HOW TO USE THE TAGS/TERMS SYSTEM**

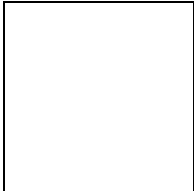
First consider the overall mission of your office and find the TAGS that describe your function. Read the definition of each TAGS and then choose the appropriate ones.

TAGS are broad categories used in identifying information. There are three types of TAGS: Subject, Geo-Political and Program (K TAGS). Information can also be arranged by Personalities and/or Organizations.

Terms are subject concepts used in connection with TAGS and serve to refine TAGS' general categories. Subject terms provide more specific coverage.

Department offices and posts should be guided by the following steps to set up manual files:

- a. Establish records on a calendar year basis or where appropriate on a fiscal year basis. This makes retiring the files easier because they will be blocked by a specific time period.
- b. If you are using more than one TAGS group, use an alphabetical guide to separate the TAGS groups e.g., A for the Administrative group, B for the Business group, C for the Consular group, and E for the Economic group, etc. Also use a guide with the TAGS name on it. See the example below.



- c. Begin creating the file folders under the appropriate TAGS and assign a term listed in the "TERMDEX" or under the appropriate subject TAGS in the TAGS/Terms Handbook that best describes the information to be filed and facilitates easy retrieval. If there are no appropriate terms located in the handbook, assign the best term that describes the information to be filed. A third concept can be added by using additional terms, i.e., geographic areas, names or organizations. This type of file is known as primary, secondary and tertiary filing and is the basis for all manual filing systems.

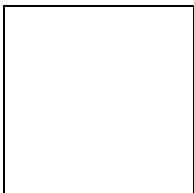
TAGS (FILE)	PRIMARY	SECONDARY
APER	TERM: RETIREMENT	DOE, JOE (PERSONALITY)
EAGR	PEST CONTROL	EG (EGYPT)(GEOGRAPHIC)
PTER	HIJACKING TWA	(ORGANIZATION)
SENV	POLLUTION ACID RAIN	(TERM)

Often, more than one TAGS will be used to cross-reference information in a document. In this case, offices should clearly identify the TAGS that is the most important, and then create a cross-reference to the other TAGS. There are several ways to create cross-reference files: computerized indexes, card file indexes, or filing a copy of the first page of the document into other TAGS files. Offices should not duplicate files for the sake of cross referencing.

- d. Label each document with the appropriate TAGS/Term in the upper right corner for easier filing.

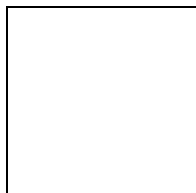
## LABELS

Start making labels using the TAGS only. When a particular subject under a given TAGS warrants a folder of its own, make a new label and include a term as well as the TAGS. **Always put the year on the label, preferably in the upper right corner.** Depending on the function of the office, the files might be set up using Subject Organizations, Personalities, and Geo-Political TAGS instead of just Subject TAGS. **If there is a disposition schedule, put it on the label.** Below are examples of labels using TAGS, terms, personalities, organizations, date and disposition schedules.



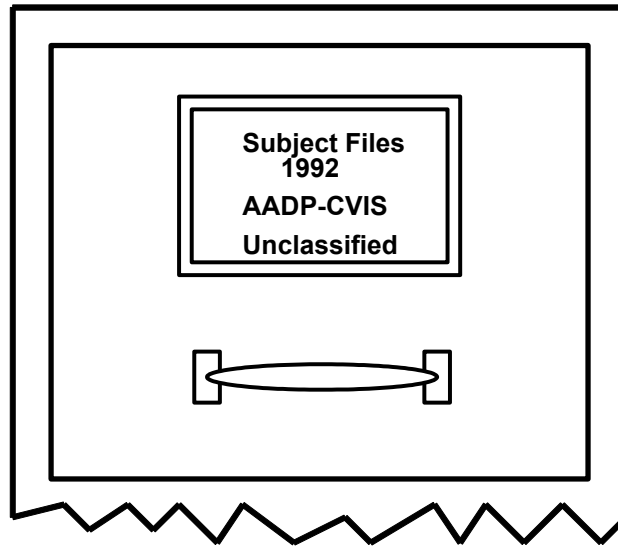
## PLACEMENT OF LABELS ON FILE FOLDERS

If using the TAGS only, place the label on the left side of the folder. Place the label in the center of the folder if using a TAGS and term. When using a second term related to the first term, place the label on the right side of the folder. This will give you a visual breakdown of your files. See examples below.



## LABELING FILE DRAWERS

The file drawers should be labeled to show the content of each drawer. See example below.



## **PREPARING A FILE LIST**

For convenience and ease in locating and retrieving files, it is suggested that a file list be prepared. The file list serves as a useful tool in identifying the records being maintained in the area and where they are located. It should be distributed to all employees of the office for their information and use, or maintain the list at the beginning of the files where everyone will have access to it.

Technical assistance in proper use of the system or in adapting it to the specialized needs of an office or post is available from A/*ISS*/IPS/PP.