



**PROCESS MANUAL**  
**BUREAU OF LOCAL GOVERNMENT**  
**FINANCE**

**BLGF-PM-04-11**

Revision Code: 00

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Section: **SUPPORT**

Effectivity Date: 01-19-2018

Subject: **RECORDS – INCOMING AND OUTGOING**

**1. PURPOSE:**

- a. To ensure proper accurate and complete identification and traceability of incoming and outgoing documents.
- b. To ensure that timely delivery of the outgoing and incoming documents to its proper recipients.

**2. SCOPE:**

This procedure covers activities from the receipt of incoming/outgoing documents, classification, recording and delivery to its proper recipients.

**3. DEFINITION OF TERMS:**

- a. **DMAS** – Document Management and Archiving System

**4. RECORDS:**

TITLE/CODE	LOCATION	RETENTION CRITERIA	RETENTION PERIOD	DISPOSAL METHOD
1. List of Received Documents (REC-003)	Central Records File	NAP R.A. 9470	10 years	As per NAP Rules
2. Incoming Documents Logbook	Central Records File	NAP R.A. 9470	10 years	As per NAP Rules
3. Outgoing Documents Logbook	Central Records File	NAP R.A. 9470	10 years	As per NAP Rules

**5. REFERENCES:**

- 5.1 ISO Clause Reference  
Clause 7.5 Documented Information
- 5.2 A document which supports the implementation of the procedure:  
National Archives of the Philippines, Act of 2007 (R.A. 9470)
- 5.3 Related documents linked to the procedure:
  - a. Work Instruction: Incoming Documents
  - b. Corrective Action Procedure

PREPARED BY: DIVISION CHIEF

REVIEWED BY: AFMS SERVICE DIRECTOR

APPROVED BY: EXECUTIVE DIRECTOR



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**6. PROCEDURE:**

ACTIVITY FLOW	RESPONSIBLE	DETAILS
	<p><b>Administrative Officer</b></p>	<p>Receives documents from internal/external sources.</p>
	<p><b>Administrative Officer</b></p>	<p>For incoming documents, refer to <b>Records Work Instructions: Incoming Documents..</b></p>

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ACTIVITY FLOW	RESPONSIBLE	DETAILS
	<p align="center"><b>Admin Officer I</b></p>	<p>Sort out and classifies according to document type.</p>
	<p align="center"><b>Admin Officer I</b></p>	<p>Records date, time, details of the outgoing documents into the Records Outgoing Logbook.</p>
	<p align="center"><b>Admin Officer V</b></p>	<p>Original goes to recipient, duplicate is retained in the Records Section for file and reference.</p>
	<p align="center"><b>Admin Officer I</b></p>	<p>Mode of delivery include the ff:</p> <ul style="list-style-type: none"> <li>• Mailing</li> <li>• Courier</li> <li>• Post Office</li> <li>• Messenger – direct delivery</li> </ul>

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	<p align="center"><b>Admin Aide</b></p>	<p>The documents are delivered to the recipient according to the mode of delivery chosen.</p>
	<p align="center"><b>Admin Officer I</b></p>	<p>The tracking number of the delivered document is posted in its duplicate. Files the duplicate for reference.</p> <p>Refer to Procedure on <b>Archiving and Retrieval of Records</b>.</p>
	<p align="center"><b>Division Chief</b></p>	<p>Reviews activities of the process to see where quality improvements can be done in the process.</p>

PREPARED BY: DIVISION CHIEF *[Signature]*

REVIEWED BY: AFMS SERVICE DIRECTOR *[Signature]*

APPROVED BY: EXECUTIVE DIRECTOR *[Signature]*



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ACTIVITY FLOW	RESPONSIBLE	DETAILS
<pre> graph TD     C{{C}} --&gt; D{TARGETS ACHIEVED?}     D -- NO --&gt; CAP[CORRECTIVE ACTION PROCEDURE]     CAP --&gt; D     D -- YES --&gt; PMR[PREPARE MONTHLY REPORT]     PMR --&gt; END([END])           </pre>	<p align="center"><b>Division Chief</b></p>	<p>Determine if performance targets were achieved.</p> <p>For unmet targets:  <b>Refer to Corrective Action Procedure.</b></p> <p>Submit complete monthly accomplishment and performance report to immediate superior every first week of the month.</p>

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