

# File Organization System Guide

## 8-Folder Structure for Federal Grant Compliance

Project Name: \_\_\_\_\_ Grant Number: \_\_\_\_\_

Folder	Contents	Filing Tips
1.0 Grant Award	Award letter, executed agreement, amendments, special conditions	Keep originals; scan for backup
2.0 Procurement	Solicitations, bids, contracts, change orders, DBE/WBE documentation	Maintain complete bid files
3.0 Financial	Budget, invoices, payment requests, SF-425 reports, bank statements	Organize by date/vendor
4.0 Labor Standards	Certified payrolls, wage decisions, interview records, BOLI forms	Keep weekly payroll records
5.0 Environmental	NEPA documents, permits, clearances, mitigation records	Keep all review documents
6.0 Progress Reports	Quarterly reports, status updates, milestone tracking	Maintain chronologically
7.0 Correspondence	Letters, emails, meeting notes, official communications	Date-stamp all items
8.0 Closeout	Final reports, certifications, audit documents, retention records	Complete before final payment

### File Naming Convention

Use this format: [FolderNumber]\_[DocType]\_[Date]\_[Version]

Example: 3.0\_Invoice\_2024-01-15\_v1.pdf

### Retention Requirements

Per 2 CFR 200.334: Retain all records for 3 years after grant closeout or final audit resolution, whichever is later.

