



STEPS TO CREATING YOUR ORGANIC RECORDKEEPING SYSTEM CHECKLIST

Build your compliant organic recordkeeping system by using this step-by-step checklist, from mapping your product flow to updating your Organic System Plan for certifier review.

- ☐ Map your current product flow from receiving through sale.
- ☐ Read [Recordkeeping Requirements for Organic Handlers](#) and assess the records used at each stage against those requirements.
- ☐ Ask yourself: What information is currently being collected? What additional information will need to be collected once the operation is certified organic?
- ☐ Create a list of the records, fields, and procedures that will need to be added or updated to make your system compliant.
- ☐ Read [Building and Maintaining an Organic Audit Trail](#) to understand traceability requirements and add any additional needs to your list.
- ☐ Read [The Mass-Balance Audit](#) to understand those requirements and add any additional needs to your list.
- ☐ Read [Chapter 5: Handling, Storage, & Transportation of Organic Products](#) to understand commingling and contamination prevention requirements and add any additional needs to your list.
- ☐ For each item on your list, ask: Can this information be incorporated into an existing record, or does it require a new form or log?
- ☐ Once you have identified the necessary changes, evaluate whether paper records, spreadsheets, software, or a hybrid approach is the best fit for your operation.
- ☐ Update your recordkeeping system to incorporate each required change.
- ☐ Trial the updated system for a week and work through any issues or bottlenecks that arise.
- ☐ Run a mock traceback audit and a mock [mass-balance audit](#) to confirm that your records provide the information needed for inspection.
- ☐ Update your Organic System Plan (OSP) to accurately describe your recordkeeping system and submit to your certifier for review.