

Recordkeeping That Works

ORGANIC FACT SHEET



Why Keep Records?

Organic certification is based on developing and following a plan for how you intend to farm or make food (or feed or fiber) organically. The records required for organic certification provide necessary details about the operation that aren't included in the Organic System Plan. As noted in the National Organic Standards, these records "must be adapted to the particular business that the certified operation is conducting" NOS[205.103].

Production records, such as a field activity log for a crop farmer, a flock health record for a poultry producer, or a roasting log for a coffee roaster, show whether or not the organic plan is being followed. Together with receipts for inputs (such as seeds, fertilizers, organic food ingredients), and invoices for sales of organic products, production logs establish traceability. Additionally, these records allow the inspector to determine if there were sufficient organic ingredients and allowed inputs to justify the amount of organic products sold or distributed (auditability). Finally, some records are required to document a response (cleaning equipment, switching sanitizers, or turning off boiler chemicals) to a commingling or contamination concern.

MOSA provides several possible documents that clients can use as part of their recordkeeping system, yet we also accept other formats if they show all of the necessary information and are auditable by MOSA inspectors. Your MOSA Reviewer will determine what's acceptable regarding the certification records at your operation. (Forms available at mosaorganic.org)

Quick Facts

- Records that help determine compliance to the National Organic Standards are required.
- You may use any record format as long as the information is readily available and auditable.
- MOSA provides ready-to-use forms for your convenience.

Recording Activities

Activity logs, where you make notes about your farming or handling practices, are the main example of a record for which MOSA does NOT provide a ready-to-use form, mainly because there are so many variations available depending on the nature and goals of your operation. Which format you choose will depend on your choice of paper or computer and whether you are maintaining the record solely as a certification requirement or as a means of understanding and analyzing your business. All collection formats work best when you record the information in a timely and consistent manner.

Here are some examples of daily activity records:

- Calendar

- Notebook
- Daily Diary
- Map with Notes
- Preformatted Template
- Spreadsheet
- Software

Organizing the Records

How the records for an operation are written will often determine how they are saved and organized. Recordkeeping can be inexpensive and relatively easy upfront, but not allow for retrieval or analysis later, or the system can be costly to establish but allow for tremendous opportunities for analyzing and using the information. The best systems allow for both easy input and output of information. Here are some of the common organizational methods:

- **The Box.** Not always a shoebox, but sometimes it has been. For the producer who has not previously saved records, this method at least locks down papers, particularly receipts and seed tags, before they scamper away. Retrieving items for organic certification from the box makes for a longer inspection.
- **Clipboards.** These works well if each clipboard contains a record of a certain type, such as seed tags or sales invoices. Farms and food handlers with software systems will often use clipboards with paper templates for production records; data from the templates is later entered into the software system.
- **Binders with paper records separated by tabs.** Records are hole-punched and then placed into the appropriate sections of the binder. Older records are archived or a new binder is set up every year or two. Producers who use this system love having all records for a year in one portable place.
- **File box or cabinet with paper files.** Like the binder, the small file box allows for all of the current records to be neatly organized in one location. The large cabinet is used for folders with archived records, or as the only storage area if portability isn't necessary.
- **Computer-based.** As more business is conducted electronically, more people

use computers to store documents such as receipts, e-mail transactions, completed certification forms, and photos of production activities.

- **Management software.** MOSA's on-line certification system, MyMOSA, provides cloud-based storage of certification records. Farms and handlers can access records from multiple computers in or out of the office. There is also data collection software available that is specifically designed for certification recordkeeping such as COG Pro.

The Goal

Developing the best recordkeeping system for each farm or processing operation depends upon the farmer or managers involved, their interest and skill with computers, the time they want to devote to creating or learning a new system, and the desire they have to use records in their operation beyond those required for organic certification.

The best recordkeeping systems are easy to maintain, easy to access, show compliance with the National Organic Standards, and provide valuable feedback about the performance of the operation.

Recordkeeping can be reduced by finding new efficiencies and working as quickly and consistently as possible. You may find that the forms provided by MOSA online, or on paper by request, will make your recordkeeping easier. We have developed these forms over many years and they are crafted with efficiency in mind.

MyMOSA, the online cloud based system, allows for even greater efficiency, with real-time input and retrieval from any Wi-Fi equipped computer or portable device.

Records are required to determine organic compliance, but with a little planning, they don't have to be a chore.

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