



# Records Management Guidance

## Managing Records Throughout Your Employment

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This guide provides the basic framework for all workforce members (including employees, temps, interns, contractors) that work with any records or information as part of their King County position.

### When You Start

Complete the [New Employee Records Management Checklist](#) and take [Basic Records Management](#) training (this 15-minute course can be retaken at any time). If you are a supervisor, you should *also* take the [Records Management for Supervisors](#) training (10-minute course).

Meet with your supervisor **and** [Records Management Lead](#) (RML) and discuss your records management duties in relation to your job.

### Throughout Your Employment

Determine which categories on your [retention schedule](#) reflect the work that you do (and need to be retained) and which records are [transitory](#) for you (and can be deleted at any time). If you are unsure of the above, talk to your supervisor or RML.

Follow best practice for approved countywide tools used for records:

[Outlook](#) (for **emails**)

[OneDrive](#) (for **documents that do not need to be shared**, or shared with less than 3 people)

[SharePoint/Teams](#) (for **documents that need to be collaborated on or shared** with 3 or more people)

[Content Manager](#) (for **inactive emails and electronic documents – file records at least once per quarter**)

Do **not** use unapproved tools to create, store, or manage records. In addition to the above best practices, refer to your agency's internal standard work documentation or file plans for more specific guidance (including folder structure and naming conventions) about how to manage records in the above tools, or in other tools your agency might use to retain records.

Check in periodically with your supervisor and/or RML and discuss managing records as part of your job.

### When You Leave

Remember, your work records do not belong to you and are property of the agency that you work for. **As soon as you know** you are leaving your current position (even if you are moving on to a different job in the county), begin using the [Exiting Employee Records Management Checklist](#) to ensure your records are managed prior to departure.

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County Records and Information Management Program (CRIMP)

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