

Action Plan | Complete Training: Basic Records Management

TASKS

- Host a 1:1 with all new employees for **records management onboarding**
- Request a report of who has completed the training (email records.management@kingcounty.gov)
- Take/Re-Take the training yourself
 - Make it a team challenge for everyone to do it!
 - Send an email to team about one thing that was meaningful to you in the training and include the link to take training
- Request time on your next team meeting agenda to talk about records management
 - Encourage staff to take the training
 - Dedicate the 15 minutes of meeting time for everyone to take the training (independently) and then talk about barriers to adopting the best practices described

RESOURCES

- **Records Management Training webpage:**
<https://www.kingcounty.gov/depts/records-licensing/records-management/training.aspx>



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Action Plan | Complete Content Manager Training

TASKS

- Request a report of who has completed the training (email records.management@kingcounty.gov)
- Take/Re-Take the training yourself
 - Make it a team challenge for everyone to do it!
 - Send an email to team about one thing that was meaningful to you in the training and include the link to take training
- Request time on your next team meeting agenda to talk about records management
 - Encourage staff to take the training
 - Complete a portion of the training during the meeting (independently) and then talk about barriers to adopting the best practices described
- Create visual accountability for training metrics:
 - Virtual tier board? If you have a tier board, add this as a metric!
 - Use SharePoint Site to make the training stats/metrics visible to team/management
- Email your team! Provide the [links to the training](#) and what you found valuable. Also link to the different training resources available: [Job aids](#), [FAQs](#).
- Host a demo yourself as a follow-up!



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Action Plan | Content Manager

Increased Use/Filing

TASKS

- Request a report of who has access to the system (email records.management@kingcounty.gov)
- Request Records Management provide a demo at your next staff meeting
 - Share Job aids
 - Encourage staff to take/Re-take the training
- Make filing a team challenge
 - Know your workplace culture before setting a filing challenge or filing project. Customize competitiveness and time dedicated to filing.
- Request time on your next team meeting agenda to talk about records management
 - Complete a portion of the training during the meeting (independently) and then talk about barriers to adopting the best practices described
- Create visual accountability for filing metrics:
 - Virtual tier board/SharePoint site
- Establish naming conventions for folders
- Identify/talk about common transitory records to delete (not file)



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Action Plan | Content Manager Folder Clean-up

CLEAN-UP TASKS

- Identify folders needing clean-up by using **saved searches** such as “Folders Empty” and “Folders w/out Cutoff Dates”
- Use Content Manager shortcuts like “tagging” to make changes to more than one record at a time (See the RM Website Job Aids)
- Review old KC ERMS folders and add descriptive information.
 - Ask Records Management for a report of “Matters” from the old system that can be useful for cleanup
- Make it a team effort! All users can update cutoff dates (only RM can delete empty folders)

PRO TIPS

- Use simple folder structures
- Avoid using sub-folders
- Take baby-steps in clean-up projects –
 - Don't let back-logs be a barrier
 - Be gentle and realistic with yourself



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