



1. Tools and Resources Checklist

What? Have the necessary tools, resources, and training to get started.

Why? A records clean-up requires a basic understanding of records management principles and processes, as well as some tools and resources to help you make decisions about your records.

Time? 1-8 hours. Dependent upon preliminary records management knowledge.

Training:

- A foundational understanding of records management is a good start. Our [Basic Records Management](#) training provides this and will help guide decision-making.
- Content Manager General User training is required to file records: [CM training link](#)

Staff Resources:

- If working in a small office, be familiar with the records on your shared drive, OR
- Have a records' contact for each unit that uses the drive you are cleaning. They should be able to provide you with information about the records so that you can make the best decisions on how to manage them. This individual may also coordinate with other staff in their work unit.

Retention Schedules:

- Obtain and review your agency-specific retention schedule, OR
- If you do not have an agency specific retention schedule, use the King County General Records Retention Schedule.
- Retention schedules are available here: <https://www.kingcounty.gov/depts/records-licensing/records-management/retention-schedules.aspx>
- If you are not familiar with all the records on your shared drive, identify point persons in your office that can help you inventory the records.

Project Plan (optional):

- If you are cleaning a large shared drive used by more than one work unit, a project plan is recommended. Contact the Records Management Program for templates and tools for this.

Disposition Forms

- An [Agency Destruction Form](#) is required to destroy records that have passed their retention requirements
- An [Archival Records Transfer Agreement](#) is required to transfer archival records that have passed retention to the King County Archives.

File directory scan software (optional):

- KCIT has made available TreeSize software available for all King County employees. This program can scan your drives and analyze the content, as well as create exportable folder lists.
- Available through the Software Center on your computer. Locate "Software Center" via your Window's Start Button.

