1. Tools and Resources Checklist

What is the purpose? Have the necessary tools, resources, and training to get started.
Why should you create one? The 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.

☐ **Retention Schedule**
- Obtain and review your Agency-Specific Retention Schedule, OR
- If you do not have and agency specific retention schedule, use the General Retention Schedule.
- If you are not familiar with all the records on your Share Drive, identify point persons in your office that can help you inventory the records.

☐ **Project Plan (optional):**
- If you are working with a large shared drive that involves more than one group, a project plan may be helpful

☐ **Staff Resources:**
- A liaison for each work unit; a point person to help answer questions about records on your drive that you are not familiar with.

☐ **Training:**
- A foundational understanding of records management is a good start. Our Basic Records Management training provides this and may help guide decision making through the clean-up process. (Class is 15 minutes in length)
- Content Manager training is recommended for all staff (different options available)

☐ **Disposition Forms**
- Disposition Request Forms are required to disposition records with retention value that have passed retention and are not stored in Content Manager.

☐ **File directory scan software (optional):**
- On your computer, at the start button, conduct a search for Software Center. Within Software Center, locate and download "TreeSize Free" or "gFileList Ultra" which are both tools that can be used to scan your file directories.
- This software will scan and produce a list of your file folders to export.

King County Records Management Program
Phone: 206-477-6889
Email: records.management@kingcounty.gov
Web: www.kingcounty.gov/recordsmanagement
08/2023