



# New and Transferring Employee Checklist

DES-RALS-ARMMS /  
Records Management Program  
206-477-6889  
[records.management@kingcounty.gov](mailto:records.management@kingcounty.gov)

As a new employee of King County, it is important to understand that there are various laws, regulations, and policies about County records. This checklist is intended to be a guide for new and transferring employees and supervisors to use during the onboarding process. It is meant for new employees to assist with learning how to manage records and the tools and resources available, as well as guidance for transferring employees to learn the records management processes in their new office.

The Records Management Program is here to help. You can reference our [resources](#) for new employees or contact us directly at [records.management@kingcounty.gov](mailto:records.management@kingcounty.gov) or (206) 477-6889.

## New employee details

Employee Name

Start Date

Department/Division/Section

Job Title

## Steps for all new employees

- \_\_\_ Complete the [Basic Records Management training](#) (15 minutes)
- \_\_\_ Review your agency's [retention schedule](#)
- \_\_\_ Meet with your [Records Management Lead](#)
- \_\_\_ Discuss records management responsibilities with your **supervisor**

## Steps for employees that use Content Manager (CM)

- \_\_\_ Complete [Content Manager trainings](#) (time is variable).
- \_\_\_ Submit a Content Manager access or installation request (*if applicable*)
- \_\_\_ **Begin using Content Manager!**



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## Complete Basic Records Management training

Within 45 working days of your hire date, complete the online [Basic Records Management](#) training (note that other trainings might fit the requirement; it will depend on your job). The course is provided online through KC eLearning (Neogov). The course will take approximately **15 minutes** to complete. Note that **it can be retaken at any time**. We recommend that employees transferring within the county retake this course as a refresher. Note that the course is automatically assigned to all *new* hires, transferring employees will need to enroll in the course on their own.

## Review your retention schedule

Within 45 working days of your hire date, you should review the retention schedule which describes the records and their retention requirements in your agency. **All schedules are available [online](#).**

## Meet with your Records Management Lead

Within 45 working days of your hire date, you should meet with your [Records Management Lead](#) to discuss how records are managed in your office. Your Records Management Lead should be the first point of contact about records management issues you encounter. They can introduce you to the processes, tools, and systems used with your work group.

## Discuss with your Supervisor

Within 45 working days of your hire date, you should discuss records management **responsibilities** with your supervisor; including any expectations for managing your records over time.

## Complete Content Manager (CM) training

If your agency uses Content Manager (CM), there are various training options available for using Content Manager, including: [30-minute online courses](#), [short demos](#), and [printable/downloadable job aids](#).

## Submit a Content Manager (CM) access or install request (*if applicable*)

Note that installation of Content Manager is automatic for all agencies supported by KCIT. Content Manager account activation is also automatic for **all** new county employees. If you do not have Content Manager installed, contact your IT for assistance. If you do not have access to Content Manager after it has been installed, contact [records.management@kingcounty.gov](mailto:records.management@kingcounty.gov) or 206-477-6889.

## Transferring Employees: Contact the Records Management Program

Inform the Records Management Program that you have transferred to a new office/organization for RMP staff to update your Content Manager credentials and ensure you have continued access to the system for your new office.



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