Content Manager Onboarding Request Form –   
Electronic Records Management

This form should be used to onboard an agency or work group into Content Manager to manage electronic records (including emails). This form should be completed by a [Records Management Lead](https://kingcounty.gov/depts/records-licensing/records-management/roles-dashboard.aspx).   
  
Please review the [Content Manager Overview](https://www.kingcounty.gov/depts/records-licensing/records-management/cm/overview.aspx), then complete the below form and email to [records.management@kingcounty.gov](mailto:records.management@kingcounty.gov).

If you are unsure of what to enter for any of these questions – that’s ok! will work with you throughout the process and help to fill in the gaps.  
  
**1. What is the name of your agency?**Include your **department, division,** and **section** name, or otherwise your agency’s place in the county’s org structure. If you want to onboard multiple groups, enter each of them below.

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**2. What records do you need to file?**  
The below records retention categories will automatically be provided to **all** agencies that are using Content Manager to manage electronic records.

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| **Category Title** | **Retention** |
| General Office Communications and Staff Meetings | 2 years after year end |
| Project Files | 6 years after project completion |
| General Office Accounting | 6 years after year end |
| Public Records Act Requests | 2 years after request fulfilled |
| Grant Administration Records | 6 years after terms of grant agreement |
| Public Complaints and Requests for Agency Action | 3 years after year end |
| Contracts, Agreements and Warranties | 6 years after contract termination/completion |

Please tell us about any **other** electronic records that need to be managed in Content Manager that are **not** included in the list above.

If you are not sure what to enter here, that’s ok. Just answer to the best of your ability and we will work with you to determine the correct retention categories. *Hint: review the* [*General Records Retention Schedule*](https://kingcounty.gov/depts/records-licensing/records-management/schedules.aspx) *for other categories you might need.*

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| **What do you call the records?** | **What function(s) do they serve?** | **Any other details? Format?**  regulatory requirements, where they live, RM habits, copies elsewhere |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |
| 5. |  |  |
| 6. |  |  |
| 7. |  |  |
| 8. [add more rows if needed] |  |  |

**3. What are the names of all staff that need access to Content Manager?**Note: this should include the names of all staff members that need access to the system. Remember that managing records is a job responsibility for **all** King County employees!

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| **Name** | **Network Login** | **Agency** enter the name of the agency(ies) they need access to – as listed in question 1 |
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|  |  |  |
|  |  |  |
|  |  |  |
| [add more rows if needed] |  |  |

**4. When would you like to begin or complete the process?**

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**5. Have you discussed this proposal with your** [**Agency Records Officer**](https://www.kingcounty.gov/depts/records-licensing/records-management/agency-contacts/aros.aspx)**?**

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**6. Do you have any other comments to share with us, including details about what you want to accomplish?**

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