**Managing a Shared Drive – Disposition Checklist**

* Organize training for the Records Custodians to prepare for the end of the FY or calendar year records Clean-Up Day.
* Notify the Records Custodians about the end of year records Clean-Up Day. Include pointers to or attach the file plan and/or records schedule.
* Ask the Custodians to make sure records are not covered by a litigation hold. If they are unsure, then they will ask the RLO.
* For the records not covered by a litigation hold, then ask the Records Custodian to consult the records schedule or file plan to identify the correct disposition authority, make sure the records are temporary (disposable), determine when and how the records were closed, and determine how long they are retained after closure.
* If any of the closed records are temporary and eligible for disposal, then ask the Custodian to complete the destruction form for each series located on the Records Management website, then send it to the records owner or the person who has the authority to authorize destruction, and then to the RLO for final review.
* If you approve the destruction, then instruct the Custodian to delete the records on the shared drive.
* If you disapprove of the destruction, then get back to the Custodian to explain why.
* If any of the closed records are permanent, then ask the Custodian to send you a detailed folder level list of what is eligible to be transferred to the National Archives.
* Review the folder list and compare it with the agency records schedule.
* Notify your NARA Electronic Records Archivist of the proposed transfer of permanent records.
* If you have an ERA account, then create a TR in ERA and attach the folder level content list(s). If you do not have an ERA account, then contact the ARO or the ERA account holder and request that a TR be created. Forward to the ARO or ERA account holder via email all information necessary to complete the TR.
* Transfer the records and any documentation to the National Archives via the agreed upon method, upon approval of the TR.
* Ask the Records Custodian to send you a list of the folders/files that need to be moved forward to the next FY or calendar year.
* Create the new FY/calendar year folders.
* Move the active files/folders forward to the new FY/calendar year folders
* Label the closed files/folder in the previous year’s files.
* Notify the Records Custodians that they can begin filing in the new files/folders