5 Things to Know for Exiting Employees

Narrator:
Leaving Your Current Job? Please do yourself, your successor, and your former department a favor. Don't leave a legacy of unorganized, obsolete records for someone else to deal with. Before leaving, take the time to identify and appropriately manage all records that still have value to your former department. Use your years of accumulated administrative knowledge to make the best decisions on how your legacy records will be handled.

Here are 5 things to know that will ensure a successful records management transition.

Narrator and on-screen text:

Number 1: You created records during your time here - let's identify and locate them!

Narrator:

If you have not already done so, please familiarize yourself with what is meant by "federal records" and then spend some time identifying and locating your records. This includes those on your desk, in your filing cabinets, storage areas and - yes - records being stored electronically.

Narrator and on-screen text:

Number 2: The records you created are subject to retention and other rules.

Narrator:

What are these rules and what steps can you take to implement them? They include records retention, privacy, current and future FOIA public access requests, and whether you can make personal copies of your federal records before you leave. Start by reviewing your office File Plan and also check your agency's or NARA's websites for guidance on all of these rules.

Narrator and on-screen text:

Number 3: You probably have ongoing project records and other information that will be needed by your successors to do your former job.

Narrator:
It is important to identify and make these records easily accessible. You'll also want to assist with the transition if protected by passwords or encryption.

Narrator and on-screen text:

Number 4: Do you have any outstanding FOIA or Congressional requests, litigation holds or other special situations?

Narrator:

Someone is going to be responsible for closing these out if you don't. As with your project files, identify and make them easily accessible, and assist with the transition if protected by passwords or encryption.

Narrator and on-screen text:

Number 5: Use a checklist to plan and document your records management transition.

Narrator:

Does your agency have a records management-related offboarding checklist? Please check with your agency records management office. If it does not, use the one on our website called "Documenting your Public Service".

A checklist will help to ensure that you have identified and covered all your records management steps before you leave.

Hopefully, you've had a productive relationship with your agency's records management contacts throughout your tenure. Here's a final chance to tap into these valuable resources as you finish up all your remaining obligations to the agency.

Once you have documented your previous journey, you are ready to embark on your next adventure!