



### Tip Sheet: Employee On-Boarding and Recordkeeping

As new employees are introduced to their job duties, they need to learn what their recordkeeping responsibilities will be so they can be successful. Supervisors who provide clear instructions to new employees will help them to adopt good recordkeeping habits from beginning.

#### Records Management Training

Most new employees should take *Basic Records Management* ([online class](#) takes 32 minutes), and additional [records management training](#) may be recommended, depending upon the employee's job duties. Supervisors should assign training to new employees and monitor their progress.

#### Recordkeeping Responsibilities

Training is important, but it only introduces employees to good recordkeeping practices. Managers and supervisors should follow-up with each employee to ensure they understand their individual recordkeeping responsibilities. Employees need to know which records (if any) they are responsible for retaining as the "official recordkeeper." If they are the official recordkeeper, they should be instructed about where the designated recordkeeping system is, what the naming conventions are, the retention schedule for the records, the security level of the records, and any other recordkeeping rules established by the office. In general, employees are responsible for:

- Filing records in the designated recordkeeping system, if they are the official recordkeeper
  - Complying with naming conventions and other recordkeeping rules
- Deleting duplicates and reference materials promptly, so they do not waste space, or create confusion or liabilities
- Promptly checking in any documents that are checked out (preferably by close of the business day), so they are accessible to co-workers who need them
- Protecting records that contain [confidential or sensitive information](#)
- Disposing of records in compliance with approved [Retention and Disposal Schedules](#)