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degrees of privacy/security that may not be appropriate for all types of records. For example, while Slack is wonderful for transient communication and project development, it is not appropriate for use with University records containing personal or confidential information, including credit cards, students/academics, students/academics, Records. See this comparison of enterprise file services provided by UW-IT. For help deciding where to store your office's electronic records, contact our office at recmgt@uw.edu. Creating a Resilient Folder Structure After you set yourself to a storage location, the next step is to create a sandbox outside your current file system and create the file structures that best allow you to find and manage the logs. Within each repository, files must be organized in the most appropriate order for quick recovery and disposition. Use an operation or characteristic of the record as the basis for the layout. Features can include a subject, function, or literally describe the type of records in the folder. Ask yourself: How will anyone search for this information? How will anyone know when to delete these files? Think about the criteria you would use when performing a search Be sure to eliminate redundancy Be sure to remove ambiguity A good folder structure has two main components: a role-based aspect that groups records created or used as part of a single office function. A time-based aspect that identifies records that will collectively reach the end of your retention period and lifecycle at the same time. Focusing on these two aspects results in folders that are covered by a single retention period and can be deleted once that period is turned on, without having to review the individual records or subfolders they contain. This includes separating transient records, such as drafts and working documents, that have shorter retention periods and can be deleted at the end of the final product. Additional controls In addition to the two main requirements for categorizing previous records, you must add subfolders as needed to organize your work in a way that makes sense given your office workflows. Consider file naming conventions to increase recognition and manage versioning. The important thing to remember is that no amount of organization is worth anything unless the system helps users and is easy to work with. Avoid the temptation to build in unnecessary complexity. The following are examples of sound folder structures for records commonly found throughout the University. Legitimate alternatives will vary in detail and complexity, but will remain valid as long as they comply with the principles described above. For help designing appropriate folder structures to organize your office's electronic records, contact with our office in recmgt@uw.edu. Inform users, Receive additional input and feedback, Provide training Now that you have a future state well considered sandbox to present, it's time to get all users up to date so they don't see the changes appear without understanding what's expected of them. You have already been communicating and engaging key stakeholders along the way; Now Now be everyone's first opportunity to see the new solution built and ready for deployment. Before filing: Make sure you have developed the system thoroughly to minimize the potential for unforeseen questions about what about [blank]?. Be explicit and document your new draft filing system. Solve any noticeable flaws so that the new system has credibility. Allow presenters and sponsors to become familiar with the new system to avoid any conflicting disagreements or understandings in training/implementation. Training presentations should: Present the objectives of the new system and explain the specific reasoning behind some of the major changes. Sell the rise and emphasize the importance of everyone sticking to the new structure. Report any changes to existing procedures. What do you ask the staff to do differently? Give users the opportunity to ask questions or make constructive suggestions. Assign responsibility: Who should ask people about changes in structure? Who is responsible for cleaning which folders? Discuss the implementation plan and schedule. Is there a period when you will live in both systems? Explain that this is a project of continuous improvement; feedback is recommended and adjustments will continue to be made to improve the system as workflows and processes evolve. In addition to training existing staff, document all decisions in such a way that they can be provided as training to new employees and serve as a reference for future changes to the filing system. Although you don't need to create this level of in-depth indexing, the following is an excellent example of presentation system documentation: Folder Name: Lab Test Name Results Content: Provides a record of preventive health risk assessments or workplace response. Includes raw data, quality control, standards, and calibration information for environmental and biological samples related to compensation, claims, and research into industrial hygiene and health problems in Washington's covered industries. Maintained according to 29 CFR1910.1020. Access Restrictions: Limited read/write access to lab managers and their supervisors. Folder structure: Each assessment and related documents must be stored in its own subfolder with the name of the 10-digit evaluation number that begins with the two-digit year. Retention: Annually, the custodian will review the contents of the Lab Test Results folder and delete subfolders that are beyond the and don't be on legal hold. Current retention requirements can be found here: Custodian: Walter White & wwhite@uw.edu; Records Management Services staff is available to help prepare and/or submit training materials. Implement system At this point, you have already collected user input, addressed pending questions, agreed on future status and now & wwhite@uw.edu; & wwhite@uw.edu; it's finally time to start making changes that users will be able to see. Be sure to return to the work you did in inventory and log analysis. Purge ROT Before moving any record to the new system, you will achieve its greatest reduction in volume and clutter by removing your existing ROT. ROT includes records that are past retention, as well as drafts, unnecessary duplicates, and transient records that no longer have any business value. Before deleting anything: Some records may be on hold due to ongoing or pending audits, lawsuits (or even reasonably planned claims) or public disclosure procedures. Records in destruction hold should not be destroyed, corrupted, or altered until the problem is resolved and you are specifically informed that such records can be destroyed. Some substantive records have long-term historical value and are designated as an archive in the General Record Retention Program. Instead of being deleted or kept indefinitely in your department, these records should be transferred to the University Archives for permanent retention. If you need help identifying ROT or simply want to make sure you've made good decisions about the records identified for deletion, take advantage of our ROT Squadron. They are a great resource to help you assign your files to a legally approved record retention program, as well as to brainstorm and comment on your planned folder structure. Migrate records with continuous retention After purging the ROT, it's time to migrate the remaining valuable records to the new folder structure. Use your inventory to identify which documents will be archived together and move them to their new repositories, directories, and folders. Depending on your situation, you may want to implement the new structure at once, or it may make more sense to use a staged approach by implementing the new structure one function at a time. This decision will depend on your calendar, the size of your group, the volume of records, and the priority you assign to move records to the new system. This is the point at which your sandbox transitions to become the new file system and the old system must become inactive. If you deploy a staged deployment, make sure that the roadmap and time are well communicated and understood by those that will be affected. It is important that users do not continue to save new records to old locations after the change has occurred. Creating a temporary home for what is left Often during a log cleanup, there will be a small minority of folders containing: A. transient or obsolete records that of your staff, for political or cultural reasons, you will be extremely reluctant to have deleted, or B. low-value records, usually created people who are no longer with the department, who would be extremely slow to thoroughly review. Something Something Allow these obstacles to bogged down your project. Move these folders to a single directory called pending deletion located outside your new folder structure. Mark folders as read-only so that records cannot be added or modified in this location. The value of these records will be evaluated using the future. If a record need arises from this location, the files in question will be moved out of this directory to the appropriate folder on the new file system. After a safe but sensible period has elapsed, delete the remaining folder and files: For folders that contain transient and obsolete records, delete one year after the new file system is deployed. For folders that contain un revised records, apply the longest applicable retention period from the date of the most recent document (for most offices, no more than 6 years): Note that date for each separate folder. This gives staff the opportunity to retrieve important records and creates additional justification for deleting records that were not used during this grace period. Document these decisions and scheduled destruction dates within folders so that future users can move forward with deletion with the confidence that no further reviews and holds are required. Include the names and titles of approvers/decision makers to add authority. Note that this approach is intended to be used only as a last resort and should be applied with moderation and consideration. If you are confused or unsure about what you need to keep or for how long, contact Records Management Services with questions or schedule an appointment with the ROT Squadron. Monitoring system deployment, tracking, and reviewing Is any new folder structure unlikely to be perfect at the factory. Schedule the time a few weeks to register with users to see what's working and what needs extra attention. If some folders only receive in frequent use, schedule additional check-ins later to give staff time to form reviews. Make your adjustments careful and consistent. As your office continues to change and grow, so will your file system. Processes and workflows evolve over time, making existing folders inadequate or obsolete. Actively take steps to prevent ROT buildup and clutter. Check periodically to ensure that the filing system continues to meet the needs of the office and users. Confirm that users follow the records are not presented incorrectly. Incorporate these system checks as part of your annual cleaning days. As you make decisions and changes regarding your new filing system, update your written documentation to ensure success and compliance. If the length or breadth of your office policy prevents its use as a quick reference, consider creating something less detailed to serve as instructions for The goal is to provide an up-to-date resource for new employees and serve as a reminder to existing staff. Carry out the annual purge Only having a strong organizational structure is not enough. Even the best file management efforts can't stop eventual log accumulation from becomes overwhelming. The only solution that works long-term is to continuously apply retention to all records. Everyone should be empowered to delete redundant, obsolete, and transient records as they pass retention. Establish a systematic process for more substantive records in order to ensure compliant and defensible destruction. At least annually, place one or more employees in charge of identifying folders that contain records that are on past hold. Ensure that everyone involved understands the retention requirements and/or how to search for them in the General Record Retention Program or departmental Record Retention Program (if applicable). Ask your Registration Authority (i.e. your Administrator, Director, President, etc.) to review the resulting list of folders for errors or records that must be on legal hold before they provide approval to delete. Upon approval, staff should contact the University Archives to transfer any file record and delete anything other than archive. If your office maintains a destruction record, be sure to update it for the period in question. Your annual purge should include folders in the pending delete location, in case you have one. Remember to contact Records Management Services when planning your cleaning day. Our office can: Help you plan the event in advance. Be present (physically or virtually) to answer any questions that arise in real time and help maintain the momentum of the cleaning day forward. Help you measure what you've achieved once cleaning is over. Email us at rotsquad@uw.edu get started. Additional Resources If, at any time in this process, you have questions or uncertainty threatening to delay your progress, please contact the Records Management Services at recmgt@uw.edu or 543-0573. Our staff can meet with you to review these issues and help you move forward with confidence. Confidence.

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