



Guide for Departing Employees

PURPOSE

This guidance establishes records management best practices for when a staff member separates from the agency. It ensures that public records created or maintained by the departing employee are properly identified, retained, transferred, or disposed of in accordance with the appropriate retention schedules, and that no official record copy is lost, mishandled, or improperly deleted during the transition.

GENERAL PRINCIPLES

A public record does not lose its status simply because the employee who created it is leaving. Agency records belong to the agency, not the individuals who created them.

No record should be deleted solely because someone is departing. Deletion is appropriate only when the applicable retention period has been met.

Records must be evaluated against the retention schedules to determine the correct series and retention period before any action is taken.

Logging destroyed records – even when not specifically required for a particular record series – is considered best practice for accountability and audit readiness.



RECORDS OFFBOARDING CHECKLIST

What Do I Need to Do Before I Leave?

1. Make sure all your paper records are filed in a designated location which is accessible to authorized employees of the agency. This includes any records stored at your home.
2. Make sure all your electronic records are filed in a designated file system or ensure that the work has been transferred to the appropriate colleague(s).
3. Delete any work that does not need to be retained, according to your agency's special and general records retention schedules. Follow all disposal procedures outlined in your agency's policy.
4. If your agency does not control email retention centrally (such as with role-based retention), make sure that all personal emails (non-business content) have been deleted from the system, and that the rest of the emails are properly retained in the appropriate folders or in accordance with your agency's email management policy.
5. Confirm that your individual permissions and any unique files in shared drives, SharePoint, Teams, or other shared storage locations have been reassigned.
6. If you are a Records Officer, inform your Division Director that they will need to designate a new Records Officer.

QUESTIONS

Contact your Agency Records Officer with any questions about how a specific record type should be classified, retained, or disposed of during offboarding. If you are the Records Officer and have questions, reach out to our email records.management@sos.oregon.gov.