***Health Information Management***

***Office of Informatics and Analytics***

Cleaning Up and Organizing your Share Drives

1. Review your Program Office, service, department, division, work center Record Inventory and File Plan for records in your Share Drive. If you have no Record Inventory and File Plan now is the time to create one.
2. Separate all files by CY and FY if finance files.
3. Define personal records for all employees.  Have them remove their personal files from the all Share-drives.  No picture of snuggles the cat, copes of GSA/GS pay scales etc.
4. Separate the content of the Share-drives between official records (work product), convenience copies (multiple copies of RCS 10-1, other PowerPoints from other organizations or work centers, records and documents produced in other departments not related to your own work product.
5. You can destroy the personal papers and convenience copies.
6. At this point you should be left with official records of your service, department, division, work center etc.
7. Use your file plan to build out the Share-drive file structure.  Ensure that you use a naming convention that is repeatable and using the same structure such as.

FY/CY of Record, the Record item number from RCS 10-1/GRS, common name of file, work center, FY/CY record is to be destroyed.

Note; you can use any order of the above some of the items all the items, just do it the same way every time.

1. Once everything is organized by records schedule and file plan you now have a structure.
2. Destroy and records that have aged out, complete a VA Form 7468 for all records destroyed with an inventory of the records destroyed.  Place them in a file.  These records can be destroyed 7 yrs. after destruction of the original official records see GRS 16.2.

**Want to Get Your Shared Drive Under Control? Start Here**

<http://recordsmanagement.tab.com/functional-classification-2/want-to-get-your-shared-drive-under-control-start-here/>

1. Building the Framework

2. Designing the Folder Structure

3. Documenting User Permissions

4. Preparing for Implementation

**NARA You-tube Training, Managing Content on Shared Drives**

<https://www.youtube.com/watch?v=MOwwQ5XdbW0&list=PLugwVCjzrJsWbTAkNkRdOj_LsgsVpMHeZ&index=2>

**NARA You Tube Creating and Using File Plans**

https://www.youtube.com/watch?v=eDOjIJM8IMA&list=PLugwVCjzrJsWbTAkNkRdOj\_LsgsVpMHeZ&index=3