

# Agency Records Coordinators (RC)

## How new RCs should prepare

- Get to know your agency. Learn about the functions of the agency and what each individual office and bureau is responsible for. Review agency [organization charts](#).
- Register for available *New Records Coordinator Training* offered by the Pennsylvania Historical and Museum Commission (PHMC) and Office of Administration, Office of Continuity and Records Information Management (OCRIM). Watch for an invitation, or contact [RA-StateRecordsMgmt@pa.gov](mailto:RA-StateRecordsMgmt@pa.gov). Training is normally offered twice a year.
- Take LSO training on “Records Management” if you have not done so or need a review.
- You will be the agency liaison with the State Records Center (SRC). The SRC maintains inactive agency records. The SRC utilizes the Enterprise Records Management System (ERMS) for retention and disposition schedules, requests for records retrievals, and agency box inventory at the SRC. You will receive a password and username for ERMS. Make sure you can log on and try creating reports and retrieving your agency’s most recent records retention and disposition schedule from the system. If you do not receive your logon credentials with 2 weeks, please notify [RA-StateRecordsMgmt@pa.gov](mailto:RA-StateRecordsMgmt@pa.gov).
- Request that an agency executive, such as your Bureau Director, send a message to all agency staff announcing your appointment as the new Agency Records Coordinator and/or Alternate Records Coordinator and remind staff to direct questions about records management to you
- Schedule a meeting or call with the former agency Records Coordinator, if possible.
- Locate and review your agency’s records management files: agency records retention and disposition schedule, agency file plan, recent records actions, approved Executive Board Resolutions, [State Archives’ holdings](#), State Records Center (SRC) transfers, SRC disposal reports, and SRC authorized personnel listing.
- Meet with your supervisor to review your agency’s existing records management program and identify the items that need immediate attention.
- Obtain and review information on your agency’s disaster recovery procedures and location of essential records.

- Contact bureau directors and/or bureau records liaisons to review their records management needs and concerns. Make sure they have up-to-date information, including retention schedules.
- Forward any relevant emails or information from the PHMC or OCRIM to bureau liaisons or ERMS authorized users.

### Resources

- Management Directive 210.5, [The Commonwealth of Pennsylvania State Records Management Program](#) and M210.1 [The Commonwealth of Pennsylvania Employee Records Management Manual](#). Review M210.7, [the State Records Management Manual](#). These give basic guidance that all employees should know about records management.
- You will receive a copy of the Enterprise Records Management System (ERMS) Records Coordinator Guide via email. This provides information on the state records center system, how to retrieve records and create reports on agency inventory and retention and disposition schedules.
- Network with other [agency Records Coordinators](#), especially agencies of similar size, or similar composition.
- Attend regular meetings of the agency Records Coordinators when scheduled by PHMC and OCRIM.
- Contact [PHMC](#) and/or [OA-OCRIM](#) for assistance with any of your records management concerns.