

Reviewing Records Schedules

Review 10+ every 5

NARA regulations in [36 CFR § 1225.22](#) state that every five years, agencies must review all records schedules that are ten years old and older, based on the date that NARA approved the schedule.

Agencies may review their agency records schedules on a more frequent, regular basis to ensure that they remain accurate, efficient, and effective.

Potential stakeholders to consult when reviewing schedules

- Program managers and staff
- Records custodians, coordinators, and liaisons
- FOIA program staff
- Agency historian
- Agency legal counsel
- System owners and managers
- Note any additional stakeholders for your organization:
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Questions to consider when reviewing schedules

Completeness: Review the schedule for completeness

- Which business process is supported by the records?
- Are there other business processes which also rely on these records? If so, does the current series description and retention also meet their needs?
- Does the schedule cover all the records related to this business process? If not, should they be included?
- Are there any new series or systems which support this process? If so, should they be included here? If they are not included in this schedule, how and when will you schedule them?

Clarity: Review the schedule for clarity and usability

- Are the series titles and descriptions clear and complete?
- Can record holders easily identify the appropriate schedule item for the records?
- Are the retention and disposition instructions clear and easy to follow?
- Are the cutoff instructions clear and appropriate?
- Are any transfer instructions clear and easy to implement?
- Are the final disposition instructions clear, appropriate, and easy to follow?

Retention: Review the retention and disposition

- Have there been any statutory or regulatory changes that affect the records' retention?
- Have there been any changes to program policies, priorities, or procedures that affect how long the records should be kept?
- Are the disposition instructions still appropriate?
- Are the records currently being retained for the amount of time specified in the schedule? If not, why not?
- Are there any records whose value has changed? Are there any scheduled as temporary which your program might now suggest should be permanent? Are there any which might be needed for less time?

Connections: Ensure the schedule reflects current connections

- Has any part of the schedule been superseded by new General Records Schedules (GRS) items?
- Are the business needs of all programs and stakeholders who use the records represented?
- How does this schedule function with schedules for other related records, if applicable?
- Could these records have historical value that isn't currently reflected in the schedule?
- Are copies of any of these records maintained as essential records under your agency's disaster response program?