

Just-in-Time Instructions for: Complete the General Information Tab

As the name of this tab implies, you will enter general information about your records schedule on the General Information Tab. To complete the General Information tab:

1. Identify the **records schedule's scope** by selecting the **appropriate choice** from the *Records Schedule Applies To* drop-down menu. Options for this menu are:

- Department-wide
- Agency-wide
- Agency Subdivision. If this option is selected, enter the **Major Subdivision** and/or **Minor Subdivision** in the available text-entry fields.

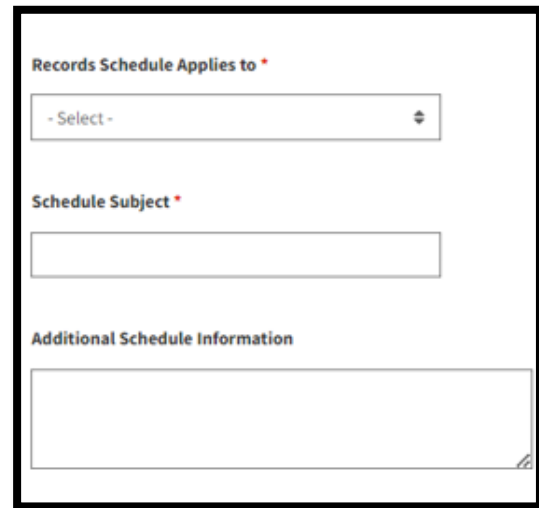


Figure 1: General Information Tab - Scope Fields

2. Enter the **records schedule's subject** in the *Schedule Subject* text-entry field.
3. Enter any **additional schedule information** in the *Additional Schedule Information* text-entry field.
4. Indicate **whether or not a classified version of the form exists** by selecting **Yes** or **No** as appropriate in response to the *Is there a classified version of this form?* field.

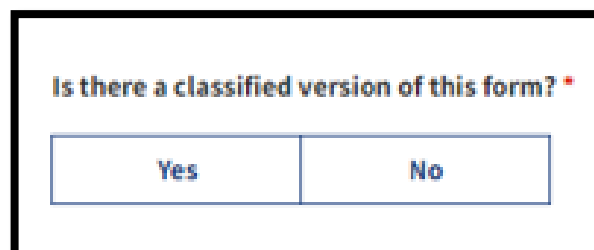


Figure 2: General Information Tab - Classification Field



Agencies cannot submit security classified Schedules in ERA 2.0. See steps 5 through 8 for additional guidance. Otherwise skip to step 9.

If a security classified Schedule is required:

5. Select **Yes** in the *Is there a classified version of this form* field but submit a public use version of the Schedule via ERA 2.0.
6. Ensure that the **Schedule Title** conforms to the following template, “PUBLIC USE VERSION – SCHEDULE SUBJECT.”
7. Include a **reference to the classified schedule** in the "Background Section" of the public use version of the schedule, e.g., “This schedule represents a public use version of the records schedule classified in accordance with Executive Order 13526.”
8. Submit the **classified version of the Schedule** outside ERA 2.0.
9. Indicate the **level of Tribal Consultation needed**, if any, by selecting accordingly from the *Tribal Consultation Needed* drop-down menu.

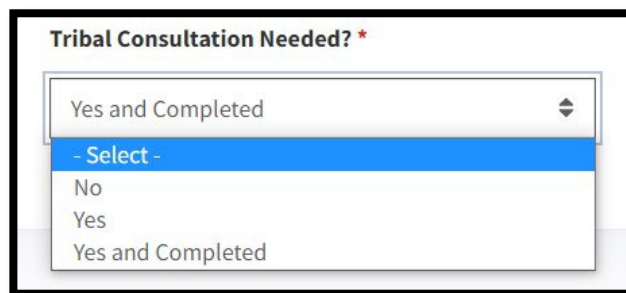


Figure 3: Tribal Consultation Needed Field

10. Select **Next**. The Contact Information tab displays.

END.