



Office of the Chief
Records Officer for the
U.S. Government

DO'S AND DON'TS OF RECORD SCHEDULING

The following is general guidance for all records schedules.

Do's	Don'ts
<ul style="list-style-type: none">➤ Inventory your records first.➤ Involve program offices. Consult them about their business needs and legal requirements for records.➤ Follow scheduling requirements under 36 CFR 1225.18(d).➤ Review the General Records Schedule (GRS) to make sure the records aren't covered.➤ Follow the guidance in the ERA 2.0 Job Aids to enter records schedule elements into ERA. Consider using the ERA 2.0 Schedule Data Entry Tool.➤ Write schedules using plain language, spelling out acronyms and explaining jargon.➤ Identify the appropriate coverage (area of application) for your schedule.➤ Include superseded items on the records schedule as appropriate.➤ Be prepared to answer questions from your appraiser.➤ Include any legislation or regulations related to record retention on the schedule.➤ Write schedules with implementation in mind.➤ Include record types, formats, content, and the purpose of the records in item descriptions.	<ul style="list-style-type: none">➤ Send NARA a schedule that hasn't been reviewed by the related program office.➤ Send NARA a schedule and expect to be done with the process. Your appraiser may have questions or ask for an appraisal meeting.➤ Submit schedules written by records liaisons or custodians without first reviewing them for accuracy and completeness.➤ Submit a schedule that you are not prepared to explain and/or revise.➤ Submit a schedule that contains administrative records without reviewing it against the General Records Schedule.➤ Copy and paste item descriptions from older schedules without making sure they are still current.➤ Copy and paste item descriptions from existing sources. These sources may not include all necessary information.➤ Schedule records that don't exist.➤ Schedule records that no longer exist.➤ Propose series for permanent retention without consulting NARA 1441.➤ Use generalized and vague wording when describing records, such as "miscellaneous," "other," or "materials."