

# HOW TO SCHEDULE AGENCY RECORDS

36 CFR 1225.12 explains how to develop a records schedule.

The **Guide to Inventory, Scheduling, and Disposition of Federal Records** walks through the process of developing a schedule.

**NARA Reviews and Approves Records Schedules in 'ERA'**  
Learn more about ERA at [archives.gov/era/records-mgmt](https://www.archives.gov/era/records-mgmt)



## INVENTORY

**Take a records inventory:** List record titles, descriptions, formats, inclusive dates, where records are stored, and who manages them.

1

## ANALYZE

**Get to know your agency and the records:** Learn its mission, functions, and structure by reviewing key documents--laws, regulations, org charts, office descriptions, & functional statements.

2



## DETERMINE SCOPE

**Determine which records should be covered:**  
The scope can vary depending on the scale of your scheduling project.

3



## DISPOSITION/RETENTION

**Assess the retention and archival value:**  
Determine how long your agency needs the records and propose a permanent or temporary disposition.

4



## CREATE THE SCHEDULE

**Organize the details and start the draft:**  
Describe the series of records, access restrictions, and disposition.

5



## AGENCY APPROVAL

**Obtain internal clearances:**  
Share the schedule with program offices and key stakeholders before submitting to NARA.

6



## SUBMIT THE SCHEDULE TO NARA

**Certify in ERA:** Certifying the schedule in the Electronic Records Archive (ERA) starts the NARA appraisal process.

7



For more information on Records Scheduling and Appraisal  
review the Guide to Inventory, Scheduling, and Disposition of Federal Records  
[www.archives.gov/records-mgmt/scheduling](https://www.archives.gov/records-mgmt/scheduling)