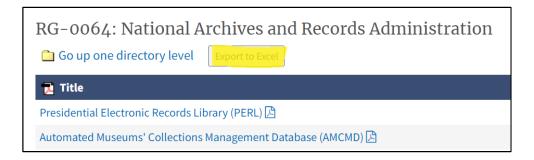# How to Use the RCS to Review Agency Schedules:
Schedule Review Job Aid
May 2024

Use this job aid as a guide through the schedule review process. You do not have to follow every step as described. If you do not understand a step, review the *How to Use the RCS to Review Agency Schedules: Instructions*, contact your appraiser, or contact LSSP_Team@nara.gov.

Collect Schedule Information

1. **Go to NARA's Records Control Schedule (RCS) Repository.**

2. **Locate your agency's schedule by Record Group:**
   ○ By RG: Use the RG search box
   ○ By agency: Use List of All Record Groups

3. **Use the Export to Excel button to download a list of your agency's schedules**.

4. **Remove inactive schedules and NA-1005s from the spreadsheet.** See the section *Schedules Marked "Inactive"* in the instructions for additional information.

Compare Schedules to Your Agency Manual

5. **Compare the active items on schedules to your agency manual to see if items are still in use.**
   ○ If the item is not in your manual, you should research why: Is it superseded? Is it no longer used (obsolete)?
      ■ You may want to wait to conduct this research until you review for superseded authorities.
      ■ You may need to talk to a program office to see if they no longer create the records.

Review Schedules

6. **Identify superseded items.**
    - Start with the most recently approved schedule and work backwards.
    - If an item indicates that it supersedes an older item, check the superseded schedule in the RCS to see if the superseded item has already been identified as inactive:
        - If yes, verify that the superseded item no longer appears in your agency disposition manual. You do not need to report the superseded item to NARA.
        - If no, add the superseded item to the Inactive Item Reporting Form.
    - Some items may only partially supersede older items. If so, you will need to check to see if other items supersede the older item before identifying it as fully inactive.

7. **Identify items that should have been superseded.**
    - You may find that you have items that should have been superseded by a later schedule, but were not identified on that later schedule. In other words, the superseded item was missed.
    - Report these missed superseded authorities to your NARA appraiser for action.

8. **Identify obsolete items.**
    - Obsolete items are those that are no longer in use in your agency. It may be that the records are no longer created or received, or all records have been destroyed or transferred to NARA.
    - Ways to identify obsolete items:
        - Check items against your internal disposition manual to see if they are still in use.
        - Verify with program offices that records are still created or maintained.
    - Add obsolete items to the Inactive Item Reporting Form.

9. **Identify items superseded by the GRS.**
    - See the section *Identifying Items Superseded by the GRS* in the instructions for additional information.
    - Once items are identified, determine if your agency will use the GRS or not:
        - If yes, add the superseded item to the Inactive Item Reporting Form, indicating the GRS you will use instead.
        - If no, your agency will most likely have to submit a new schedule requesting a GRS deviation.

10. **Identify items that require or may require rescheduling.**
    - Look for the following:
        - Temporary items on media specific schedules, including schedules approved before 2017. These items only apply to paper records. If the records are now in a digital format, they will need a new schedule.

- Older items that may not reflect current business practices or processes.
- Schedules covering records from offices or programs that have been reorganized. Are these schedules still accurate?
- Schedules for electronic systems. Has the system changed since the schedule was approved?
- Schedules impacted by electronic recordkeeping. Many processes have moved to electronic recordkeeping, has this change impacted what information or data is created or collected?
- Schedules impacted by new technology. Has new technology impacted the information or data described on the schedule?
- As discussed above, items for records covered by the GRS where the GRS does not meet the agency's recordkeeping needs.
  - These items do not need to be reported to NARA.
  - Your agency will need to submit new schedules to supersede these items as needed.

11. **Review findings with program office staff.**
    - Review authorities with program staff to verify that the records are still created or maintained and that the existing disposition authorities still work.
      - Are record descriptions accurate?
      - Is the disposition instruction implementable?
      - Is the retention too long or too short?
      - Does the item reflect current business policies or practices?
      - Does the item reflect current statutes or regulations related to the records?
    - If you identify records that are superseded by the GRS, verify with program staff that the GRS disposition authority will work.
    - Note that if you identify significant discrepancies we advise a full inventory and rescheduling of the office or function. *See the Inventory, Scheduling, and Disposition Guide and Resources for more information on this process.*

Reporting Items to NARA and Follow-up

12. **Report missed superseded items to your agency's assigned appraiser.** See Step 7 above.

13. **Report inactive items.** Fill out the Inactive Item Reporting Form to report inactive items to NARA. Submit the form to LSSP_Team@nara.gov. See the section *Reporting Inactive Schedules/Items* in the instructions for more information.
    - Identify the schedule and item number.
    - Use the drop-down options to select why the item is no longer in use.
      - If the item is superseded by another active item, provide the superseding disposition authority (including both the schedule and item number).

- If the item is superseded by the GRS and your agency is going to use the GRS, provide the GRS item you will be using.
- If all records have been transferred to NARA, provide the Transfer Request (TR) number or SF-258 number, if known.
- If the function was transferred to another agency, provide the name of the agency.
    - Provide any additional information about inactive items that seems relevant.
    - NARA will review your inactive items, including those superseded by the GRS, and verify that they may be inactivated. See the section *Reporting Inactive Schedules/Items* in the [instructions](#) for more information.

14. **Any remaining items should fall under one of the following categories.**
    - Active items not requiring any change.
    - Items covered by the GRS, but your agency wishes to continue using an agency-specific authority. *You will need to submit a new schedule for these items as the GRS notification period has passed.*
    - Items requiring a new schedule.

15. **Prepare schedules for any records that require rescheduling.** Contact your [NARA appraiser](#) for assistance.

16. **Once NARA has verified your inactive items, update your internal records management documents.**

17. **Update your internal records management documents with new disposition authorities, once approved.**

18. **Disseminate updated records management documents to agency staff.**