

Transcript, “What is a Records Schedule?”

Description: The National Archives building appears. Title: What is a records schedule?

A records schedule is a document that tells you how long to keep specific types of records and tells you what should happen to those records.

Description: A records schedule appears on screen. It reads: Records of Animal and Plant Life. Documentation of individual animal and plant species studies and observations. Permanent: Transfer to National Archives when 30 years old.

In the U.S. Federal government, records schedules are required. Agencies must have schedules for their records, and those schedules must be approved by the National Archives and Records Administration.

An approved records schedule tells us how long we must keep records to support the agency’s work, to protect legal rights and interests, and to document our history.

Description: A records schedule appears on screen. It reads: Financial transaction records related to procuring goods and services, paying bills, collecting debts, and accounting. Temporary. Delete 6 years after final payment or cancellation.

Records schedules help us make sure that everyone in the agency is retaining records for the same, standard amount of time, and they help us ensure that future generations will have access to the information they need to understand our part of history.

Description: A records schedule reads: Agricultural Trade Policy Files. Proposed bills on agriculture and trade-related issues, hearings,

negotiations, and related correspondence. Permanent. Transfer to the National Archives when 30 years old.

In the U.S. Federal Government, we use two main types of records schedules. The General Records Schedules, or GRS, cover common administrative and housekeeping records. All agencies use the GRS in addition to their own unique agency-specific records schedules.

Description: Two types of federal records schedules. General Records Schedules, GRS, administrative records common across the government. Agency-specific records schedules. Unique records documenting agency mission and programs.

The General Records Schedules are developed and approved by the National Archives. They are mandatory for all federal agencies. The General Records Schedules cover records like budgets, personnel files, travel, basic contracts, building maintenance, emergency planning, and security.

Description: General Records Schedules. Records common across agencies. 1. Finance. 2. Human Resources. 3. Technology. 4. Information Management. 5. General Operations Support. 6. Mission Support.

Records schedules help us ensure that we have the information we need, when we need it. By using the same records schedules for the types of records we all share across the government, we ensure consistency and continuity across departments and agencies.

Description: Records schedule reads: GRS 5.3, 010. Continuity planning and related emergency planning files. Temporary. Destroy when 3 years old or 3 years after superseded or obsolete, whichever is applicable.

Of course, in addition to general administrative activities, government agencies do many different types of work. Each agency has its own unique mission and its own specific programs, and each agency will have records that directly support and document those programs.

Those program records, sometimes called mission records, are covered by agency-specific records schedules that are drafted by each agency and reviewed and approved by the National Archives.

Description: Records schedule reads: Weather and climate prediction models. Computer-based simulations used to provide guidance in developing and verifying forecasts. Temporary. Delete three years after model is eliminated and new version is successfully implemented.

You can see the unique mission and work of an agency reflected in its agency-specific schedule. So, the program records you'll find in the National Park Service's schedules will be different from those at the U.S. Mint, Bureau of Indian Affairs, Department of State, or Department of Education.

Description: Records schedule reads: Presidential Scholars Program Records. Lists of Scholars and Distinguished Teachers, representative copies of award certificates, lists of sponsors, and records pertaining to related partner organizations. Permanent. Cut off annually upon close of program awards cycle. Transfer to NARA after cutoff.

While the content of each records schedule does vary from agency to agency and from one group of records to another, most schedules do have the same basic components.

For each records series – each type of records - you'll find a title and a description. The title usually reflects what the records are called in the agency, and the description helps you identify how the records are used and what types of material might be included in a typical set of records.

Description: Elements of a schedule. Series title: Project History Files. Series description: Records documenting the development and implementation of agency projects. Includes project charter, plan, reports, and project close-out documentation. The rest of the schedule reads: Temporary. Cut off when project is completed or discontinued. Destroy 10 years after cutoff.

The disposition is usually made up of two different parts. The first part, the cutoff, determines when a file will close, and when its retention clock will start.

Description: The same records schedule is shown. This time, the cutoff is highlighted. The cutoff reads, "Cut off when project is completed or discontinued."

After the cutoff, the file's retention clock starts ticking. In this second part of the disposition, we would close the file when the project is completed and retain the project history file for 10 years after the cutoff date.

Description: The same records schedule appears. The retention and final disposition are highlighted. Those instructions read, "destroy 10 years after cutoff."

Some records schedules will include transfer instructions. In this example, we have permanent records. Their historical value means they will ultimately be transferred to the National Archives and retained forever.

Description: A records schedule for Program Policy Files describes the records as documents related to the creation, approval, and implementation of agency-wide policies. The retention is listed as permanent, cut off at the end of the fiscal year in which the policy was approved. Transfer to the National Archives ten years after cutoff. The transfer instructions are highlighted.

When you need to find your own agency's records schedules, there are several key places you can look. First, take a look at your organization's intranet or website. Many agencies post their schedules online. You might check your agency's orders, policies, or directives, because many records manuals and schedules are issued that way. Your agency's Records Officer and network of records contacts will be able to help. You can also find both the General Records Schedules and a collection of agency records schedules on NARA's Web site at [archives.gov](https://www.archives.gov).

Description: Learn more at www.archives.gov.