

On screen: The National Archives logo, an eagle with one wing outstretched, with the words, "Word of the Week: Records Schedule."

Narrator: Our word of the week is 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.

On screen: A picture of a person standing on the bank of a river. An example of a records schedule is also on screen. The schedule says, "Water Quality Planning and Management Files. Documents related to water quality planning, management and implementation."

Narrator: Records support and document our work. They help us protect the rights and interests of citizens and help us document the policies our government has developed and implemented.

On screen: A black and white vintage photo of a woman in a ball cap and coveralls working on an engine. Also on screen is a sample records schedule which reads, "Motor Vehicle Operating and Maintenance Files. Maintenance records, including those relating to service and repair."

Narrator: Records keep our world moving. They help us track the work that has been done and the money that has been spent.

On screen: A picture of a flood which has covered most of a brick building marked "Federal Building." Also on screen is a sample records schedule that reads, "Continuity of Government Program Development and Planning Files. Documents relating to the development and planning of concepts and programs relating to Continuity of Government systems."

Narrator: Records help us plan ahead, and they help us respond in times of crisis. In order to have the information we need, when we need it, we must have a plan that allows us to identify, manage, and retain records for the right amount of time.

On screen: A 1980s photograph of two office workers looking at a large computer printout. Also on screen is a sample records schedule which reads, "General Accounting Ledgers. General accounts ledgers, showing debit and credit entries, and reflecting expenditures in summary. Destroy 6 years and 3 months after the close of the fiscal year involved."

Narrator: In the U.S. Federal government, all records must have a records schedule, and all records schedules are reviewed and approved by the National Archives and Records Administration. The records schedule tells us how long each type of record is to be retained, and it tells us whether the records will be destroyed someday or transferred to the National Archives to be retained forever.

On screen: A photograph of a golden wheat field with tree-covered hills in the background. Also on screen is a sample records schedule which reads, "Agricultural Trade Policy Files. Proposed bills on agriculture and trade-related issues, hearings, position papers, updates, negotiations and related correspondence. Permanent. Transfer to the National Archives when 30 years old.

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

On screen: The words, “Two types of records schedules: General Records Schedules (GRS) and Agency-specific records schedules.”

Narrator: 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. Individual agencies also have their own unique agency-specific records schedules.

On screen: The title, “General Records Schedules – Administrative records common to most agencies.” Also on screen is a partial table of contents for the General Records Schedules listing title one, Civilian Personnel Records and other chapters.

Narrator: The General Records Schedules are created and approved by the National Archives for use by all Federal agencies. In the GRS, you’ll find schedules for general housekeeping and administrative records – the kinds of records you would expect most agencies to have. Agencies across the Federal government use the GRS, and that helps us make sure that our retention of these records is consistent.

On screen: A black and white photograph of a man in a cowboy hat. The man is sitting at a table and writing with a pencil in a ledger. Also on screen is a sample records schedule that reads, “Budget Background Records. Cost statements, rough data and similar materials accumulated in the preparation of annual budget estimates. Destroy one year after the close of the fiscal year covered by the budget.”

Narrator: The General Records Schedules cover administrative records like budgets, personnel files, travel, basic contracts, building maintenance, emergency planning, and security.

On screen: A colorful poster advertising the U.S. Savings Bonds program. Also on screen is a sample records schedule which reads, “Savings Bond Purchase Files. Authorization for Purchase and Request for Change – U. S. Savings Bonds, S. B. 2152, or equivalent. Destroy when superseded or after separation of employee.”

Narrator: In the GRS, you’ll also find records related to payroll and accounting, as well as motor vehicle maintenance, telecommunications, mail and package delivery, property disposal, and many other common types of records that support our day-to-day operations.

On screen: The words, “Agency-Specific Records Schedules.” As the narrator speaks, several photographs appear and disappear from the screen. First is an image of an astronaut walking on the moon. Next is an image of a teacher standing next to a student at a desk, followed by a snow-covered mountain, a rescue helicopter, soldiers, and a town’s main street with a large construction crane towering over the buildings, followed by a walkway flanked with flags.

Narrator: 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. We call those program records, or mission records. Those records are covered by agency-specific records schedules that are created by each agency and reviewed and approved by the National Archives.

On screen: A 1970s era photograph of a man in a lab coat, standing by a large cabinet filled with different bottles. Also on screen is a sample records schedule which reads, “Enforcement – Pesticides Program. Documents pertaining to the collection of pesticide samples, the laboratory analysis of the samples, the conformity of the packages and labeling to standards and sample content, discovery of violations, and enforcement activities. Close inactive records upon completion or termination of case. Destroy 8 years after file closure.”

Narrator: 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 Environmental Protection Agency's schedules will be different from those at the U.S. Mint or Department of Interior, or Department of Education.

On screen: A black and white photograph of a badger standing in dirt. With the photograph is a sample records schedule which 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."

Narrator: You can start to identify your own agency-specific mission records by looking at the activities and programs that make your organization unique. For example, if you look at the schedules for the National Park Service, you'll find program records documenting park policies and facilities, and records tracking plants and animals.

On screen: A photograph of a boat sailing on a lake with mountains in the background. With the photo is a sample records schedule which reads, "Marine Safety Charts. Each chart covers a different segment of the U. S. coastline. These charts contain information about warning and forecast products and list all radio stations broadcasting weather for each area covered by a chart. Record copy – permanent. Transfer directly to N A R A on issuance."

Narrator: When you look at the schedules for the National Weather Service, you'll find program records focused on the work that agency does to forecast, track, and communicate weather patterns and events.

On screen: A slide titled, "Elements of a Schedule." The schedule item reads, "Project History Files. Records documenting the development of agency projects. Includes project charter, plan, reports, and project close-out documentation. Temporary. Cut off when project is completed or discontinued. Destroy 10 years after cutoff."

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

On screen: An arrow marked Series Title points to the first line of the schedule, "Project History Files." An arrow marked "Series description" points to the paragraph describing the records.

Narrator: For each type, or records series, you'll find a title and a description. The title usually reflects what the records are called in the office, and the description helps you identify how the records are used and what kinds of material might be included in a typical set of records.

On screen: An arrow marked "Disposition" points to the word "Temporary" and the instructions telling how long to retain the records.

Narrator: The records schedule tells the disposition of the records. The disposition is the ultimate fate of the records - what should happen to the files. In this example, we have temporary records. A temporary record is one that will ultimately be destroyed when it is no longer needed to support the work of the agency or to protect someone's rights and interests.

On screen: An arrow marked "cutoff" points to the phrase, "Cut off when project is completed or discontinued."

Narrator: 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. In this example, a file is cut off when the project it documents is completed or canceled.

On screen: An arrow marked "retention and final disposition" points to the words, "Destroy 10 years after cutoff."

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

On screen: A new records schedule appears. It is headed by the words "Ethics Files," which are labeled with an arrow marked "Series title." An arrow marked "series description" points to the words, "Files relating to recusals, waivers, and ethics agreements, and copies of reports and documents related to ethics training." An arrow marked "cutoff" points to the words, "Cut off at the end of the Fiscal year." An arrow marked "retention and final disposition" points to the words "Destroy 6 years after cutoff."

Narrator: Here's another example. We have a series title and description, and this case, we're going to cut off – to close – the files at the end of the Fiscal Year, then destroy the files six years later.

On screen: A new records schedule appears. It is headed by the series title "Program Policy Files." The description is "Documents related to the creation, approval, and implementation of agency-wide policies. The disposition says, "Permanent. Cut off at the end of the Fiscal Year in which the policy was approved. Transfer to the Federal Records Center two years after cutoff. Transfer to the National Archives ten years after cutoff." The two sentences beginning with "Transfer" are underlined, and an arrow marked "Transfer instructions" points to them.

Narrator: Some records schedules will include transfer instructions. In this example, we have permanent records. Permanent records have significant historical or other value, and permanent records will ultimately be transferred to the National Archives to be retained forever. In this example, we have two sets of transfer instructions. First, the files are transferred to the Federal Records Center for storage. Later, the files will reach their final disposition and they'll become part of the National Archives.

On screen: A 1980s photograph with four office workers around a personal computer. A sample records schedule says, "Information Technology Program Planning Records. Records relating to the development of agency I. T. programs. Cut off annually. Destroy or delete when 7 years old or when no longer needed, whichever is later."

Narrator: Your agency will use a combination of the General Records Schedules and agency-specific schedules. Your records, whether they are created in paper form, as e-mail messages, as electronic documents, data sets, or 3-D models, all need to be managed according to the appropriate records schedule. Schedules are created for all record formats, so you will find records schedules that apply to your electronic documents, information systems, and Web sites, as well as photographs, audio and video files, and, of course, paper.

On screen: A slide titled, "Find your records schedules." On the slide are four bullet points reading, "Agency Intranet or Web site. Agency policies or directives. Records Officer and Records Management team. Archives dot gov."

Narrator: When you need to find your own agency's records schedules, there several key places to look. First, take a look at your organization's Intranet or Web site. Many agencies post their schedules online. You might also check your 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 also be able to help you. And, you can find both the General Records Schedules and a collection of agency record schedules on NARA's Web site at archives.gov.

On screen: The National Archives logo appears with the words, "For more information about the U. S. National Archives and records management, visit www.archives.gov"

Narrator: If you'd like to learn more about creating, applying, and updating records schedules, or if you'd like more information about available records management training, visit us online at archives.gov.

On screen: A black background with the National Archives National Records Management Training Program logo.