Identify Unscheduled Records - Synthesized

Instructions for Using This Job Aid

Use this job aid when you are assigned to identify unscheduled records. Check off each step when you have completed the step.

Procedure	Actions/Decisions	
1. Identify potentially unscheduled records.	1. Inform the ARO that you have identified some records that are potentially unscheduled.	☐
	2. Ask program staff to review records to create and provide a description of the records series to the ARO/RM unit in preparation of the review of the existing scheduling authorities.	☐
	3. Informs the ARO that the records must first be matched with a corresponding disposition authority or scheduled for further action to be granted.	☐
2. Review General Records Schedule to locate record's corresponding disposition authority.	1. Read the General Records Schedule (GRS) and compare the records series and description to the GRS authorities. * Note: In some cases, the ARO/RM staff and other stakeholders may perform a similar review (Step 2.1) at the same time or after the program staff has submitted its review results. * Note: Many administrative electronic systems will be covered by the GRS.	☐
	2. If the corresponding disposition authority is found, then notify the program office can use the GRS item(s) as legal authority.	☐
	3. If a corresponding disposition authority cannot be found in the GRS, then continue to sub-step 3.	☐
3. Reviews agency schedules to see if records are scheduled.	1. Read the agency records schedules to see if an authority matches the records description. * Note: Having a good understanding of the records series description is beneficial, especially when using functional schedules to find an authority. For example, Big Bucket schedules do not reference all series titles within their broad descriptions.	☐

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	2. If the corresponding disposition authority is found, then notify the program office can use the schedule item(s) as legal authority.	☐
	3. If an authority is found but no longer provides adequate descriptions or instructions for the records as they exist for current business (i.e. retention instructions too short or long, requires additional descriptive information, program functions change, reorg, etc.), then notify the ARO that the records need to be rescheduled.	☐
	4. Notify the program staff that a new records schedule is pending and that the records cannot be destroyed.	☐
	5. If an authority cannot be found in the agency schedules, then notify the ARO that the records need to be scheduled.	☐
	6. Notify the program staff that a new records schedule is pending and that the records cannot be destroyed.	☐