

Capstone for Electronic Messages Texting Transcript

Rich: Hi Isabelle, I wanted to update you on my new job 😊

Isabelle: Great to hear from you, Rich. We've already been missing you! How's your new agency?

Rich: Thankfully, no big surprises. Their approach to records management is very similar to how we used to do things. Except... there is something new maybe you should look into it.

Isabelle: Tell me more...

Rich: We're going to use the "Capstone" approach for electronic messages.

Isabelle: What is Capstone? You mean like how we manage email? Retention is based on the organizational position of the mailbox holder.

Rich: Yes. The same.

Isabelle: But I didn't know we could also apply this to electronic messages.

Rich: We couldn't. Up until very recently. NARA just released an expanded Bulletin 2023-02.

Isabelle: Good. I always thought this was eventually going to be an option.

Rich: Same here. So, do you know which GRS is involved?

Isabelle: No, I'm not sure.

Rich: GRS 6.1

Isabelle: Of course. 6.1 is one of the most important General Records Schedule items for us.

Rich: Well, NARA has extended this GRS to specifically include many forms of texts, chats, and instant messages. Check it out for the details!

Isabelle: How do we get started using GRS 6.1?

Rich: We're going to submit a new Form NA-1005 so we can use Capstone for both email and other types of electronic messages. This is so that we can also specify which types of electronic messaging will be managed through Capstone.

Isabelle: Remind me. What's the purpose of the NA-1005?

Rich: To get NARA approval for how our agency would like to apply GRS 6.1, including our list of proposed Capstone (permanent) positions.

Isabelle: I see...that's the form we use to notify NARA which agency job positions we are proposing to be designated as Capstone officials. Easy enough!

Rich: Yes. Once it is approved by NARA, we will capture text messages every 90 days and apply a 3-year, 7-year, or permanent retention. Depending on who is sending or receiving the messages.

Rich: But, just like Capstone for email, we have flexibility to set our own policies on how frequently we will capture the messages and how granular we make the retention periods.

Isabelle: Then, I'm guessing that all of my chat messages here are going to be automatically maintained for a 7-years.

Rich: Probably... unless you have been promoted since I left.

Isabelle: No. Same old me! But I think that my agency is also going to want to go in this direction. Oops... I have to run to a meeting now. Does NARA have additional information on its website?

Rich: Yes, they do. Check it out here [Bulletin 2023-02](#). And for a Capstone refresher, go to the NARA Records Management Training program website to check out their collection of Capstone lessons and videos.