

Hello.

We have been diligently working on a new database with our IT department to be able to create and revise Retention Schedules at a records series level. This database will save us time going forward in how we currently manage tracking multiple agencies' retention schedules, imaging and microfilm requests, and a slew of other tasks that we manage throughout multiple databases. This new database can be thought of as one-stop shop if you will and is more efficient and streamlined.

With the changes we have requested, we are seeing differences in report layouts and functionalities we were once used to. That means you will also see changes. We wanted to take this opportunity to make you aware of the way retention schedules will change in appearance. They still have the same information but there are a couple of pieces of additional information that will appear on them that you may find also find useful.

Noticeable changes include:

Format:

- There are no longer columns with lined boxes dividing up the record series item number, record series name, retention years, or start of retention remarks. Instead, they are listed in continuous rows.
- The new retention schedules begin with a General Record Series number.
Example: **General Record Series 12345** (instead of item number which you are used to seeing)
We had to go with this so that our database could start assigning one unique number for each record series name, so that duplicates could not be reused.
- The **Record Series Name** is directly below the General Record Series Number and is slightly indented and bolded. Example:

General Record Series 12345

Accident and Incident Prevention / Safety Program and Safety Training Records - Asbestos Management Plans.

- The retention remarks immediately follow below.

Type:

- You will see four **types** slowly added to future retention schedules as they are added or updated to the database going forward. These are the four records series type that we train on when covering the topic of categorizing records series. These include:
Administrative, Legal, Fiscal, and Historical and are for reference only
- **Legal Citation:** Any applicable CRFs, USCs, etc. will be here.

- **Legal Remarks:** Any legal reference or backup that supports the retention may show up here for additional reference.

*The **date in bold to the right** of each General Record Series number is the date the General Records Series was approved and published and is automatically extracted with the report.*

A sample of retention schedule is shown below:

Records Retention Schedule for All State and Local Agencies Risk Management Records GS 1038	
General Record Series 30284	5/18/2016
Accident and Incident Prevention / Safety Program and Safety Training Records - Asbestos Management Plans.	
Retention: Retain for life of facility.	
Type: Legal	
Legal Citation: §29 CFR 1910.1001(j)(3)(i)(ii).	
General Record Series 30278	5/18/2016

More exciting changes will be coming. We will keep you informed, will eventually be making this database searchable to all agencies. In the meantime, please let us know if you have any questions or concerns.

Regards,

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