

Records Schedule Item

one item from an agency records schedule, checked against the office's own description of what it holds | Final specimen

<https://www.editfast.com/editing-services/records-management>

A schedule item whose description no longer names the thing it covers, read against the inventory the office supplied.

FINAL TEXT

SPECIMEN, PREPARED BY EDITFAST FOR ILLUSTRATION. NOT A REAL SCHEDULE.

Prepared for the Office of Grants Administration (fictitious), draft schedule item 4-1

EXTRACT FROM THE OFFICE'S INVENTORY (reproduced unchanged in both panels)

IN-1 The series consists of applications, reviewer comment forms, and award or declination letters.

IN-2 Since 2019 the series has been created and maintained in the grants management system. No paper is created.

IN-3 Reviewer comments are entered in the system by named reviewers and are visible to the program officer.

IN-4 The office reports that the retention it wants is six years, counted from the close of the award.

IN-5 The office uses the word file to mean an application and everything attached to it.

IN-6 The office has not stated whether declined applications close on the date of the declination letter.

ITEM 4-1. GRANT CASE FILES

Description: Electronic case files in the grants management system, consisting of applications, reviewer comment forms, and award or declination letters. A file is an application and everything attached to it.

Disposition: Temporary. Destroy 6 years after the close of the award.

[Query to the records officer: IN-6 does not say what closes a declined application. As written, the disposition has no starting date for a declination, and the wording will not tell a later reader what to count from.]

[Query to the records officer: the draft description said reviewer's working notes. IN-3 records reviewer comments entered by named reviewers and visible to the program officer, which is a different thing from working notes, and 36 CFR 1222.12(c) treats working files under two conditions of its own. The description now uses the inventory's term.]