

Records Schedule Item

one item from an agency records schedule, checked against the office's own description of what it holds |
Marked-up 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.

ORIGINAL, WITH EDITS MARKED

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: Paper case files containing correspondence and supporting papers relating to grant applications, including the reviewer's working notes.¹

Disposition: Temporary. Destroy 6 years after cutoff.³

WHAT CHANGED, AND WHY

#	Was	Now	Reason
1	Description: Paper case files containing correspondence and supporting papers relating to grant applications, including the reviewer's working notes.	Description: Electronic case files in the grants management system, consisting of applications, reviewer comment forms, and award or declination letters. / [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.]	IN-2 records that the series has been electronic since 2019 and that no paper is created, so the word paper no longer names what the item covers. IN-1 gives the three components the office says are in the series, against the draft's correspondence and supporting papers. The working notes phrase is raised rather than rewritten, because the classification behind it is the office's to make.
2	(the description does not define its own term)	A file is an application and everything attached to it.	IN-5 records the office's own use of the word file. The item uses that word in its title and its description without saying what it takes in, and a later reader has no way to recover the meaning from the page.
3	Disposition: Temporary. Destroy 6 years after cutoff.	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.]	IN-4 gives the event the office counts from. The word cutoff names a filing practice rather than an event, and a retention instruction that does not name its own starting point cannot be applied from the page. The gap for declined applications is raised rather than filled.