How to Add Permanent Disposition Instructions

1. Select ***Permanent*** under the **Final Disposition** header.

Figure 1 Final Disposition Header - Permanent Disposition is Circled and Grayed

2. Select a ***cutoff instruction***.
3. Select a ***retention period***.
4. Click ***Yes*** or ***No*** to the question: **Are there multiple instructions for this item?**
5. If Yes, click ***Add Instructions.***

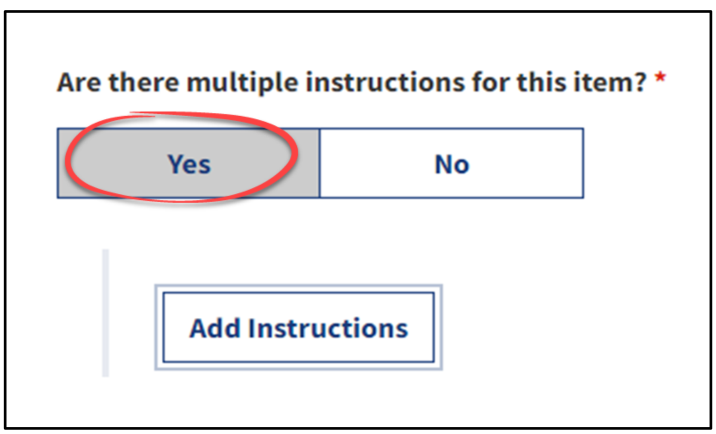

Figure 2 Multiple Instructions Field – Yes is Circled and Gray

6. Select the ***applicable item***.

Figure 3 Select Records Field

7. Complete the ***Transfer Instruction*** fields that apply to the item.

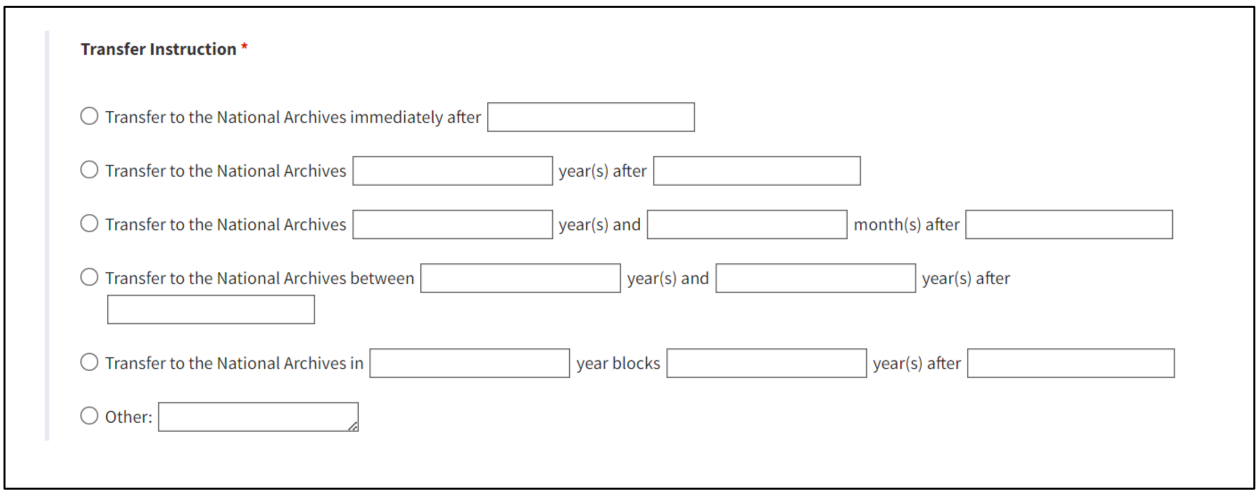

Figure 4 Transfer Instruction Fields

8. Click ***Add***.
9. Repeat steps 5 through 8 until the ***transfer instructions*** for all items are added.

Instructions will display in the expanded **Add Instructions** field.

If you answered ***No*** to the question, **"Are there multiple instructions for this item?"** only the transfer instructions menu will display.

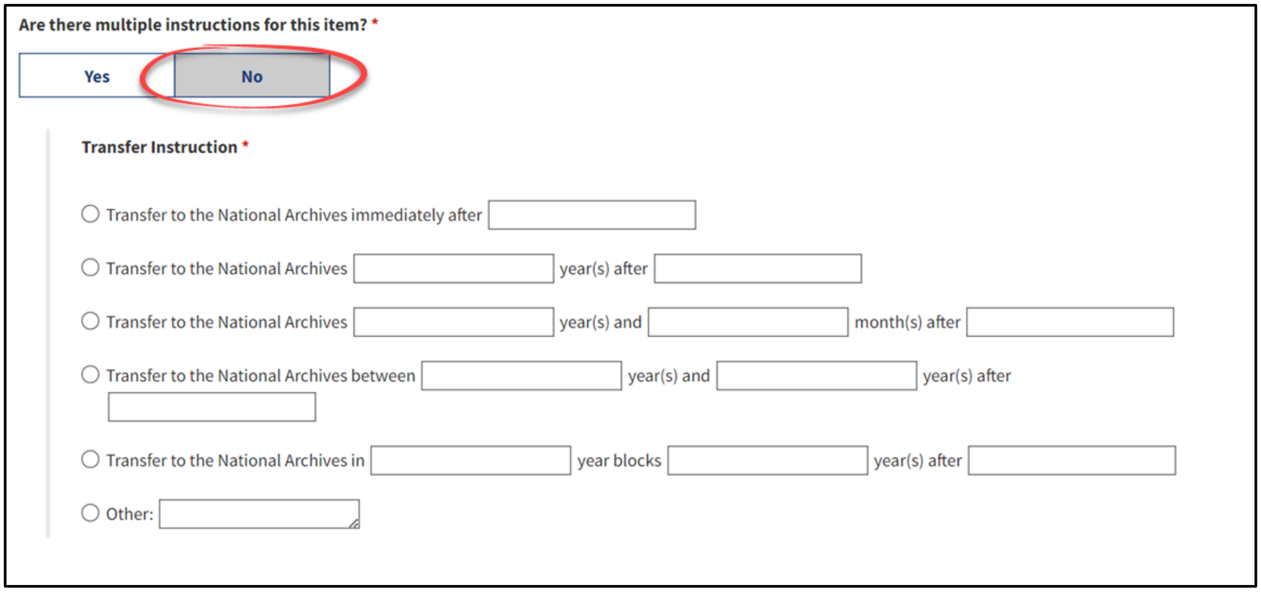

Figure 5 Add Instructions Menu, No is Circled

10. Complete ***the fields*** that apply to the item.
11. Click ***Add***.
12. Click ***Next***.

To Add an Item

13. Select ***Add Item***
14. To add more than one item, select ***Add Item and Create Another***.
15. Verify that ***the item*** was added.

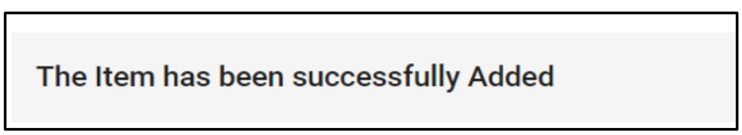

Figure 6 Add Item Confirmation Message

16. Repeat actions until all new items have been added.
17. Select ***Records Schedule Items*** to return to the **Items** tab.

The **Additional Information** tab appears.

How to Add Additional Information for Permanent Items

Use the **Additional Information** tab to enter relevant details about a specific Item. The presented options will vary based on your prior input (i.e., whether you selected ***Permanent***, ***Temporary***, or ***Disposition Not Approved*** disposition instructions for the item).

18. Enter the ***legal citation*** for the records retention (if applicable).
19. Select the ***current format*** of the records.
20. Enter the ***current volume*** of the records.

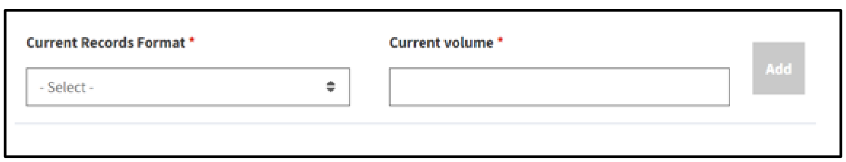

Figure 7 Current Records Format Field

21. Select ***Add***. The information appears in the **Current Records Format** and **Current Volume** fields.
22. Repeat ***steps*** to include other formats.
23. Enter the ***first year*** of records covered by this authority (**Optional**).
24. Enter the ***last year*** of records covered by this authority (**Optional**).
25. Enter the ***date span of the initial transfer*** (**Optional**).

NOTE: The system validates the dates by ***Year***. You may leave the **Month and Day** fields blank - but the Year field **must** conform to ***the standard year format (YYYY)***.

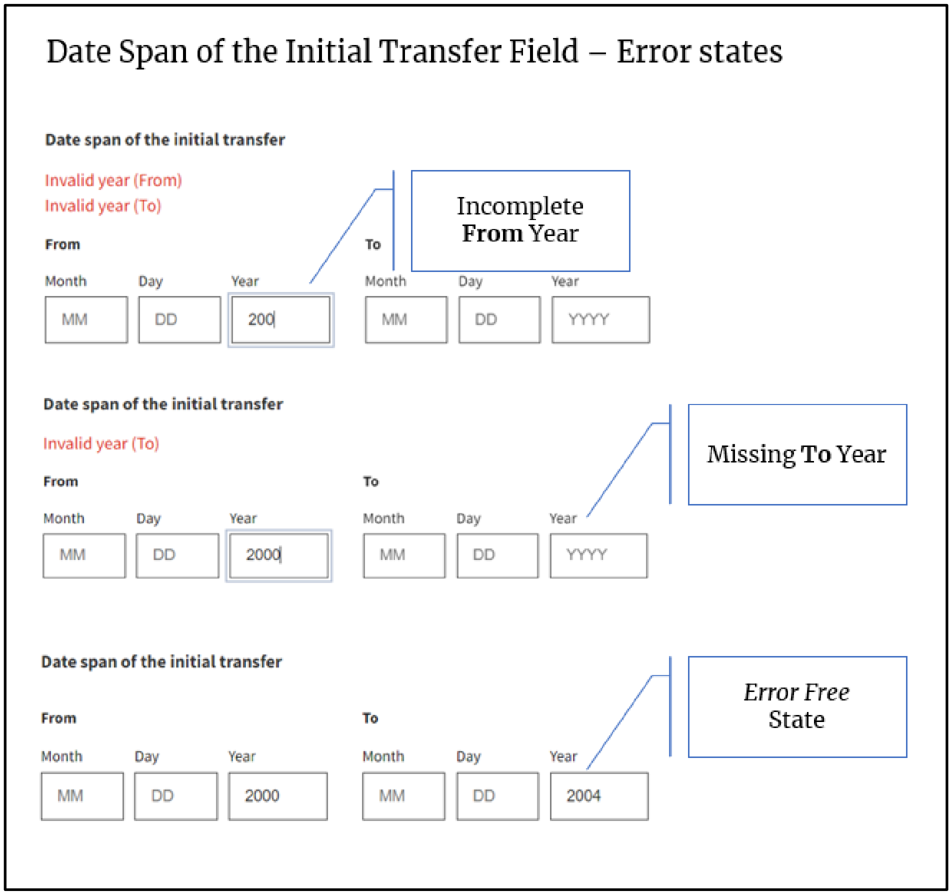

Figure 8 Date Span of the Initial Transfer Field - Error Status

26. Enter the ***frequency of transfer*** (**Optional**).

Examples: For a one-time transfer, enter "0." For records cut off annually, enter "1." For records cut off in 5-year blocks, enter "5."

27. Click ***Yes*** or ***No*** to: **Are any of the records covered by this item subject to a FOIA exemption?**

If ***Yes***:

Using the drop-down menu, select the ***FOIA exemption(s)*** that apply.

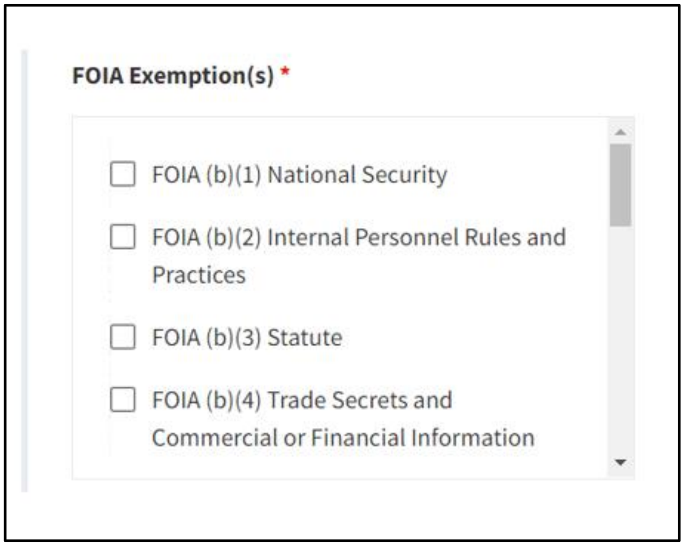

Figure 9 Section of the FOIA Exemption(s) Menu

28. If you select the FOIA (b)(3) exemption, enter the ***related statute***.
29. If No: Select ***Next*** to view information in the **Preview & Submit tab**.

Once the **General Information** and **Contact Information** tabs are complete and all the associated items are entered on the records schedule, you can submit the records schedule for certification.