

How to Add Permanent Disposition Instructions

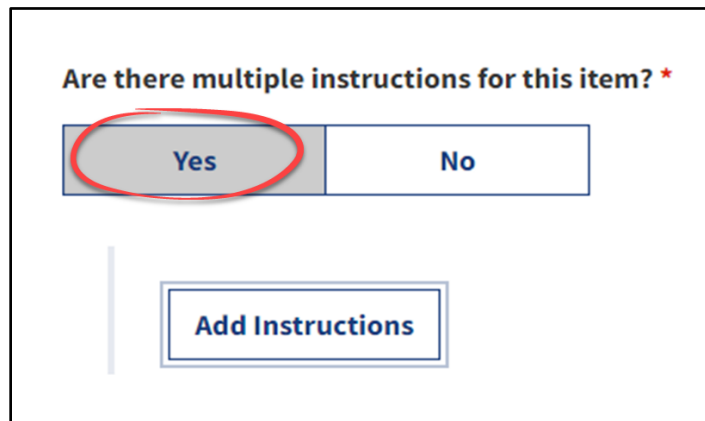
1. Select **Permanent** under the **Final Disposition** header.



The screenshot shows a form titled "Disposition Instruction". Below the title is a red "Required Field*" label. Underneath is the "Final Disposition *" header. There are three buttons: "Temporary", "Permanent", and "Disposition Not Approved". The "Permanent" button is circled in red and has a gray background, indicating it is the selected option.

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**.



The screenshot shows a question: "Are there multiple instructions for this item? *". Below the question are two buttons: "Yes" and "No". The "Yes" button is circled in red and has a gray background. Below the buttons is an "Add Instructions" button.

Figure 2 Multiple Instructions Field – Yes is Circled and Gray

6. Select the **applicable item**.

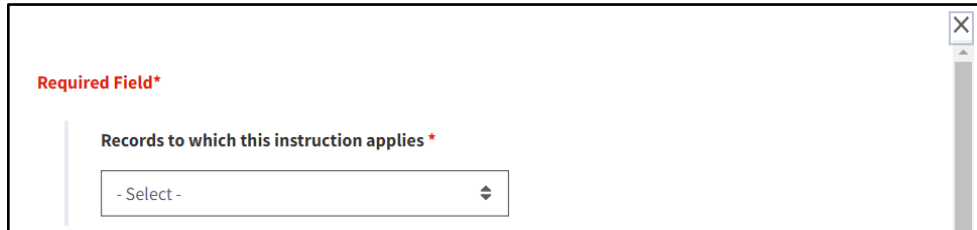
A screenshot of a web form element. At the top left, it says "Required Field*" in red. Below that is a label "Records to which this instruction applies *" in bold. Underneath the label is a dropdown menu with the text "- Select -" and a small downward arrow icon. The entire form is enclosed in a rectangular box with a close button (X) in the top right corner.

Figure 3 Select Records Field

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

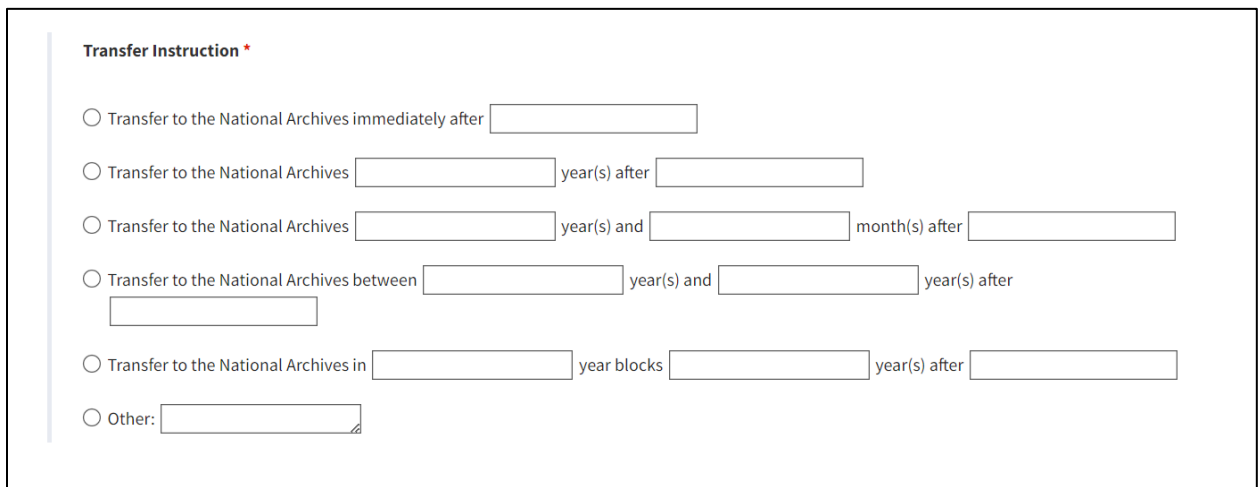
A screenshot of a form titled "Transfer Instruction *" in bold. It contains several radio button options, each followed by input fields for years and months. The options are: 1. "Transfer to the National Archives immediately after" followed by a year input field. 2. "Transfer to the National Archives" followed by a year input field, "year(s) after", and another year input field. 3. "Transfer to the National Archives" followed by a year input field, "year(s) and", a month input field, "month(s) after", and another year input field. 4. "Transfer to the National Archives between" followed by a year input field, "year(s) and", another year input field, "year(s) after", and a year input field. 5. "Transfer to the National Archives in" followed by a year input field, "year blocks", another year input field, "year(s) after", and a year input field. 6. "Other:" followed by a text input field with a small icon at the end. The form is enclosed in a rectangular box.

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.

Are there multiple instructions for this item? *

Yes No

Transfer Instruction *

Transfer to the National Archives immediately after

Transfer to the National Archives year(s) after

Transfer to the National Archives year(s) and month(s) after

Transfer to the National Archives between year(s) and year(s) after

Transfer to the National Archives in year blocks year(s) after

Other:

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.

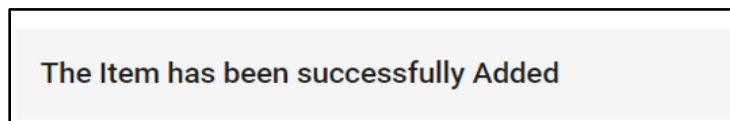


Figure 6 Add Item Confirmation Message

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.

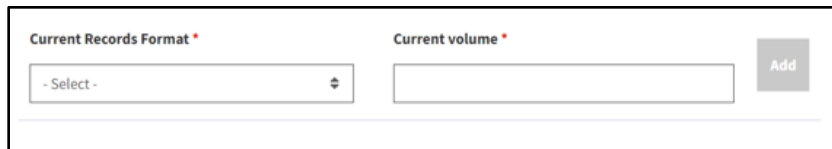
The image shows a user interface for adding records information. It features two input fields: 'Current Records Format' with a dropdown menu currently showing '- Select -' and a small downward arrow, and 'Current volume' with a text input box. To the right of the 'Current volume' field is a grey button labeled 'Add'. Both fields have a red asterisk indicating they are required.

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)**.

Date span of the initial transfer field – Error states

Date span of the initial transfer
Invalid year (From)
Invalid year (To)

From To

Month Day Year Month Day Year

MM DD 200 To Year

MM DD YYYY

Date span of the initial transfer
Invalid year (To)

From To

Month Day Year Month Day Year

MM DD 2000 To Year

MM DD YYYY

Date span of the initial transfer

From To

Month Day Year Month Day Year

MM DD 2000 MM DD 2004

Incomplete From Year

Missing To Year

Error Free State

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.