

KEEPING A SCHEDULE CURRENT

2153

(No. 2 Mar. 1998)

A retention schedule must be kept current to be of value. Any addition, elimination or significant change in an existing function makes it necessary to amend the schedule to reflect the change. Also, retention periods for scheduled records may have to be revised periodically to reflect changes in their referral rate.

It is important that any change or addition to a retention schedule be made promptly and that those using the schedule be notified immediately. Any delay increases the chance of someone relying on an incorrect schedule.

POINTS TO REMEMBER:

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- **Avoid interference with current operations.** Records should be transferred or destroyed during a slack period, if possible.
- **Handle by bulk.** It seldom pays to destroy or transfer records in very small quantities.
- **Tie-in with file breaks.** Distinguishable file breaks make the transfer of records to storage or their destruction relatively easy. File breaks permit the transfer or destruction of records in large blocks with a minimum of handling (Example: income tax returns filed by year of the return.)
- **Hold purging to a minimum.** It is costly to purge files on a paper-by-paper basis or when each folder must be reviewed completely. Normally, purging should not be done unless the disposable material can be separated easily from an individual folder, such as temporary records filed on one side of a folder. In most cases, records can be kept in an office area several years and in a records center even longer before storage cost equals the cost of purging.

Before any agency undertakes a purging project, it should estimate the costs of the job and the potential savings. If necessary, a pilot test can be undertaken to validate the estimate.

- **Exceptions to This General Rule Must Be Carefully Identified:** Personnel Files and other personal information require regular purging. Consult Section 1600 of SAM, the Information Practices Act, Personnel Rules and Regulations, or your personnel office for guidance.

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