

QUICK REFERENCE GUIDE: RETENTION SCHEDULE REVISION

Introduction

This document provides guidance for Records Management Officers preparing an application for revision of their agency retention schedule. It is recommended that agencies review their retention schedules at least every 2 years and update their schedule, as necessary.

Requirements

An agency must submit a schedule to modify the retention period of a record series or change the substance of the description.

Records currently received or generated by the agency which are not listed on the retention schedules should be added.

Series which are obsolete, meaning no new records will be created in the series, should be indicated as such on the schedule.

Procedure

Use the Schedule Revision Template provided by DORIS to enter the requested revisions. Each series should be listed on a separate row.

As indicated on the template, provide both original series information and requested revisions on the spreadsheet.

Include a citation listing the justification for all series you are proposing or updating. The citation may be from the NYC supplemental schedule, the New York State LGS-1, or other legislative or policy regulations that impact the retention period.

Submit your revisions for approval by emailing the revision spreadsheet to DORISmrm@records.nyc.gov.

If you have questions about the procedure outlined above, or any other records matters, contact your records liaison directly, or the general Records Management mailbox at DORISmrm@records.nyc.gov.