A Guide to the IARA/Agency Retention Schedule Update Process

1. Agency Records Coordinator and IARA Records Analyst discuss changes to a current retention schedule. (This may be initiated by the agency, or by IARA.)

2. Records Analyst sends an MS Word draft with proposed revisions to Records Coordinator.

3. Agency staff reviews draft, and either approves it as-is, or suggests further changes.

4. Records Coordinator either passes request for further changes to Records Analyst (back to Step 2), or notifies Records Analyst that this is the final draft (on to Step 5).

- ("Final draft" should mean that everyone at the agency who might want to make any changes, *including the Agency Head*, has seen and agrees on this version.)

5. Records Analyst submits final draft to IARA's Executive Director for review.

6. If Executive Director requests additional changes, the draft goes back to Step 2. If not, on to Step 7.

7. Records Analyst e-mails PDF packet to Records Coordinator which includes a cover sheet with e-signature field for Agency Head to sign.

- (Barring emergency corrections, no changes should be requested at this point.)

8. Records Coordinator e-mails the digitally-signed pdf back to Records Analyst.

9. Records Analyst routes to State Board of Accounts for their review and signature.

10. Fully signed packet is placed on the agenda for the next available monthly meeting of the Oversight Committee on Public Records (OCPR).

11. Records Coordinator is notified of meeting date/time/location and whether an agency staff member needs to attend.

12. If <u>not</u> approved by OCPR, Records Analyst contacts Records Coordinator about requested changes, and draft is re-submitted to OCPR the following month. (It doesn't have to go back through steps 5 to 10.)

13. If approved by OCPR, a cleaned-up formal document will be signed by IARA Executive Director, then e-mailed to Records Coordinator in PDF form. **This is the new official schedule.**