

U.S. DEPARTMENT OF ENERGY
Records Scheduling Request

Instructions: Complete one request per records schedule or series item. Appointed records contacts will submit completed form to the Departmental Records Officer via DOERM@hq.doe.gov for review, decision and coordination, as appropriate.

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| 1. RLO/RMFO Name (Prepare) | 2. PRO Name (Review/Clear) | Date (IM-23 Use Only) |
| 3. Program Subject Matter Expert Name(s) – position title(s) optional | | |
| 4. DOE Element (e.g., OCIO (IM-1)) | 5. Subordinate Organizational Unit (e.g., RMD (IM-23))– <i>if applicable</i> | |
| 6. Requested Action: (select one) Establish (new) Revise Cancel (discontinue active schedule) | | |
| 7. Schedule Authority - If establishing, no information needed. If requesting revision to supersede a NARA-approved schedule, or requesting cancellation, cite the NARA schedule authority. (e.g., GRS 1 item 4, N1-434-89-1 item 2) | | |
| 8. Item – Identify the common name, term, or title used to identify the record item or series. Spell out first use and include acronym or short title after if applicable. (e.g., Contracting Officer Representative (COR) Folder) | | |
| 9. Description – Describe applicable and relevant items that comprise the record item or series content (file or folder), irrespective of format or media type. Spell out first use of acronyms or short titles in your description, including organizational names and information systems. | | |

NOTICE: Federal records are not authorized for destruction until a records disposition authority has been approved for implementation. Safeguard all records against accidental and intentional damage, loss, theft, destruction, and other compromises.

10. Disposition – Provide a proposed disposition for the retention period of the record item or series.

Temporary (destroy/delete) or Permanent (**Do Not** destroy/delete)

Cut off when – specify action (e.g., annually, when approved, when closed, fiscal year-end)?

Destroy/delete how long after noted cutoff occurs? years and/or months

11. GAO recordkeeping requirements for auditable Financial related records be maintained for a minimum of 3 years. If seeking a retention period less than the required 3 yr., please provide justification for GAO exemption.

12. Justification - Provide supporting justification for proposed disposition, including specific and detailed citations for all applicable laws, regulations, and/or policies that govern the records created and/or collected. Note any minimum retention requirements set by law or regulation. Identify applicable business processes that may support the proposed disposition, such as processing timelines or coordination cycle periods. Provide acronyms and spell out the first use where appropriate. Provide all information on this form and ensure applicable samples and supporting information is accessible for the conduct of records appraisals.