

Office of Information Affairs

Designation for Records Liaisons and Custodians

In accordance with Departmental Regulation [3080-001, Records Management](#), [36 C.F.R. 1220.34\(d\)](#), and requirements from the National Archives and Records Administration (NARA), the U.S. Department of Agriculture (USDA) must assign responsibility for records management duties within each program and administrative area.

Individuals assigned records management duties, referred to as Records Network staff, in each program office and sub-office liaise between the Department or Agency Records Management Office and Program leadership. They physically manage program records and information through the records lifecycle, from creation or receipt to final disposition.

Management activities for Records Network staff include serving as points of contact for records scheduling, identifying unscheduled records, conducting records inventories, creating File Plans, coordinating questions about records management training, and managing the disposition of records, under their NARA designated [Agency Records Officer](#) (ARO). Each program office and sub-office must identify a Records Liaison, a Records Custodian, and alternates for both roles.

Records Liaisons are typically senior staff (GS-13 and above) who understand how their organization works and can help leadership support good records management. They are responsible for:

- Answering basic records management questions from coworkers by knowing USDA records policy and guidance;
- Identifying issues and sending them to the Records Custodian, leadership, and the ARO, when needed;
- Using USDA Records Schedules and the USDA General Records Schedule (GRS);
- Being familiar with NARA records management rules;
- Managing shared drives, SharePoint sites, or Teams sites, as assigned;
- Reviewing records inventories, file plans, and requests to transfer or dispose of records, and sharing them with the ARO;
- Making sure any unscheduled records are reported to the ARO;
- Coordinating with the ARO when programs or offices make changes; and
- Helping update or create new records schedules.

Records Custodians are typically GS-9 staff who work closest to the program's day-to-day records. They handle routine records management tasks and help make sure program offices follow USDA requirements. They are responsible for:

- Answering basic records management questions from coworkers by knowing USDA records policy and guidance;
- Identifying issues and sending them to the Records Liaison or to the ARO when needed;
- Using the USDA Records Schedules and the USDA GRS;
- Completing and submitting the required forms for transferring or disposing of records and providing them to the Records Liaison;
- Creating box lists for hardcopy records;
- Completing and submitting the required forms to request program records from storage locations, such as a Federal Records Center (FRC);
- Creating and maintaining records inventories for their program office;
- Creating and maintaining file plans for their program office;
- Making sure any unscheduled records are reported to the ARO; and
- Helping update or create new records schedules.

When the USDA electronic records management system (ERMS) AgRecords is active, Records Network staff will manage the disposition approval process for each office's electronic records and information.

Access to Information

Supervisors should be aware that personnel assigned to the Records Network will be granted access to view and edit records and information within the AgRecords system. To assign specific access permissions to personnel, Supervisors must notify their Agency Records Officer.

Action Requested

Records Liaisons and Records Custodians play a key role in making sure records are properly managed, preserved, and disposed of according to legal and administrative requirements. Their designation is a formal, documented step that helps maintain the long-term integrity and accessibility of agency records.

To make sure each program office has the staff it needs to meet its records management responsibilities, **Supervisors must identify a Records Liaison and Records Custodian, and their alternate(s) for each program office and sub-office, by location. Supervisors must enter this staffing information in Table 1 below and return it to their [ARO](#).**

For example, a program with offices nationwide may assign one Records Liaison in a regional office and Records Custodians for each local office. Alternatively, both a Records Liaison and Records Custodian may be assigned within in each local office, depending on staffing needs and availability.

Table 1: Records Network Designation

Program Office	Role	Name	Location	Supervisor Name
	Records Liaison			
	Records Liaison Alternate			
	Records Custodian			
	Records Custodian Alternate			

If Records Network staff separate or responsibilities change, Supervisors must notify their ARO within five business days, to terminate their access to sensitive information. Supervisors should also designate a replacement and notify their ARO within five business days of separation or role change.

After Designation – Next Steps

Once staff have been identified for your Program office, Agency Records Offices will provide training, answer questions, and begin the process of inventorying and scheduling Program office records. From there, File Plans will be created for your offices, and finally, those plans will be implemented with approved NARA disposition authorities.

For any questions, contact the Departmental Records Program: Departmental Records Officer (DRO) Beatriz Collazo, at Beatriz.Collazo@usda.gov, or USDADepartmentalRecords@usda.gov.