



NARA Virtual Appraisal Checklist

The Office of the Chief Records Officer supports virtual appraisal meetings where appropriate to assist agency records management programs with the important work of scheduling federal records. This checklist will help ensure that your virtual appraisal meeting is successful.

- Please contact your [NARA appraisal archivist](#) directly to arrange for a virtual appraisal visit.
- Agency Records Officers (AROs) should work with their NARA appraisal archivist to develop an agenda for the virtual appraisal meeting.
- Meetings should be conducted using mutually-acceptable audio and video conferencing software that:
 - has the ability to share the screen to provide access to digital content in real time; and
 - offers multiple means of communicating synchronously such as video conferencing, telephone, and chat features.
- Arrange access to records in all formats and create a representative sampling. Requests by NARA for access to analog or digital materials relevant to the proposed records schedule will be prepared in advance by the agency allowing all participants to review documents during or in advance of the meeting. This may involve digitizing sample sets of analog records, arranging a virtual demo of an information system, or providing access to examples of electronic records from an information system.
- AROs should arrange for appropriate agency staff to be present during the virtual appraisal meeting. Agency representatives necessary to conduct the appraisal may include records, program, and sometimes IT staff in order to understand business processes of the agency and determine the value of the records. Discuss and agree to the list of attendees with your NARA appraisal archivist.
- * If your records are classified, please contact your NARA appraisal archivist directly to discuss the appropriate way to review them. Please note that not all records contained in proposed schedules are good candidates for a virtual appraisal. These include fragile and unique analog formats that are difficult to duplicate such as oversized maps and glass plate negatives etc.