

Retention and appraisal

Custodia Registry · G03

Your task and authority

Berland Hope

- Confirm your assigned duties
- Use the fictional training case
- Verify the result and its history

Learning outcome

Learner finds the governing retention basis and distinguishes appraisal from final disposition.

Schedule and authority

Berland Hope

- Locate the schedule and its authority for the sample series.

What to check

Find the schedule that governs the sample series and the recorded authority behind it. The application stores the basis; it does not create the organization's authority to retain or dispose of records.

Trigger and period

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- Explain its trigger/period rather than guessing a deletion date.

What to check

Read the trigger and period together. A period cannot be applied correctly without its starting event. Do not guess a deletion date from the age of a record alone.

Schedule or appraisal entry

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- Enter an approved training schedule or appraisal where authorized.

What to check

Use approved training values when entering a schedule or appraisal. Management permissions and organizational approval are separate requirements. Keep the source of the decision with the entry.

Supporting evidence

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- Inspect linked evidence and print the available Annexure 2 form.

What to check

Inspect the linked evidence and available Annexure 2 output. Compare the printed information with the saved appraisal. Producing a form does not establish that every required review has taken place.

Next authorized decision

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- Identify the next authorized decision without executing disposal.

What to check

Identify who must review the appraisal and what remains outstanding. Appraisal and final disposition are different stages. This exercise stops before any destructive action.

Exceptions and recovery

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- Identify the blocked condition
- Preserve the relevant evidence
- Use the authorized next step

Important boundary

Software does not supply legal authority. Organization-approved schedule and committee evidence must be supplied; do not claim legal certification.

Guided practice

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- Work within the assigned role
- Show the resulting state
- Explain one exception

Your exercise

For a fictional series, identify the retention trigger, period and authority. Explain which further decision is needed before disposition.

Practice debrief

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- Correct identity and authority
- Traceable result and history
- A justified next step

Expected answer

The learner names the governing evidence, interprets trigger and period together and distinguishes appraisal output from final disposal authority.