

Transferring Permanent Records to NARA Using ERA:

Cross-walking the ERA Transfer Request to the SF 258

Electronic Records

Job Aid



The U.S. National Archives and Records Administration
8601 Adelphi Road
College Park, MD 20740-60001

SF-258 fields mapped to ERA Transfer Request (TR) fields

General Information Tab

Attach an approved Records Schedule Item. Once RSI is attached, several TR fields will be Pre-Populated (PP) using information from the Records Schedule.

Note: DAA #s are born ERA Record Schedules/Record Schedule Items
DAL is a legacy Disposition Authority (NI, NCI #). Agencies must submit a request to their appraisal archivist for legacy schedules to be put into ERA.

* = Required field

Search Create Tools

Create Transfer Request

Save Cancel

General Information

General Information

- SF 258 (Block 6)
- SF 258 (Block 5A) (PP)
- (PP)
- SF 258 (Block 5B) (PP)

* Disposition Authority Number: DAL-0029-2008-0015-0004 Attach

* Agency or Establishment: Bureau of the Census

* Record Group: 0029 - Records of the Bureau of the Census

Major Subdivision: Governments Division

Minor Subdivision:

* Electronic Legacy Data: No

Select "No." NOT on SF 258

SF 258 (Block 14)

Manual Citation

Manual Citation	Manual Title
Manual Citation is an Agency's internal Disposition Authority Number	

SF 258 (Block 4A and 4B)

Transfer Group Description: Federal Assistance Awards Data System (FAADS), FY 99

Edit Spell check

Search Create Tools

Search Home > Search Results >

Transfer Request TR-0029-2011-0145

Status Draft

Save

View PDF

Cancel

Submit

Go

Delete

LIT

* Security Scan:

No

Legacy Disposition Authority Number: NC1-029-82-004 / 50

* Type of Legal Transfer: Direct Offer

Always "No" (PP)

Transaction Type

Add

Delete

Transaction Number Type

Transaction Number

Disposition Authority

Records Schedule Item Title: Federal Assistance Award Data Systems (FAADS)

Inclusive Dates

SF 258 (Block 4B)

* From:

10/1/1998

* To:

9/30/1999

Access Restriction

* Access Restriction Status: Unrestricted

Specific Access Restriction:

Security Classification:

SF 258 (Block 7)

Not used for Electronic Records

NOT on SF 258 (PP)

SF 258 (Block 7 and 12)

SF 258 (Block 13)

Privacy Act Notice Number: Agency System Number:
Federal Register Volume: Federal Register Page Number:

Use Restriction

Use Restriction:
Specific Use Restriction:
Use Restriction Note:

Records Type

General Records Type:

NOT on SF 258

Click "Save"
See next slide for results

Transfer Request TR-0029-2011-0145

Status Draft

Save Cancel

Access Restriction

* Access Restriction Status: Unrestricted

Specific Access Restriction: [List Box] ... Security Classification: [List Box] ...

Special Marking: [List Box] ... Statutory Citation: [List Box] ...

Access Restriction Note: [Text Area] View Spell check

Privacy Act Notice Number: No

Federal Register Volume: [Text Box] Federal Register Page Number: [Text Box]

Message

Transfer Request TR-0029-2011-0145 has been successfully created.

OK

Search Create Tools

Transfer Request TR-0029-2011-0145

Status Draft

-- Select Next Action --

* = Required field

PP from General Information Tab

Transfer Details

Transfer Group Description: Federal Assistance Awards Data System (FAADS), FY 99

Cutoff: * **Transfer Group Disposition Date:** 7/22/2011

Current Physical Location of Records

SF 258 (Block 8)

Agency Location: Yes

SF 258 (Block 2A)

SF 258 (Block 8A)

Agency Name and Address: Census Bureau

Not on SF 258

Destination Physical Location of Records

Location: National Archives at College Park - Archives II (College Park, MD)

Destination Custodial Unit: NVMME - Electronic and Special Media Records Services Division

* Transfer Method

Search Create Tools

Search Home > Search Results >

Transfer Request TR-0029-2011-0145

Status Draft

Save View PDF Cancel -- Select Next Action -- Go Delete

Transfer Method

Electronic Means

Electronic Records Transferred by Electronic Means

Purely electronic, over the wire records

Paper, photo prints/negatives, maps, blue prints, sound (non electronic audio and sound recordings)

Physical Means

Electronic Records on Physical Media

Physical Transfer of Non-Electronic Records

CD, DVD, USB, Hard Drive, Magnetic Tape, Floppies, etc.

Physical Media Types - Electronic Records

Add Delete

Quantity	Transfer Media Type	Estimated Volume	Container Description
<input type="checkbox"/> * 12	* Digital Versatile Disk (DVD)	* 100 * MB	

Not on SF 258. Select one

NOTE: More than one Physical Media Type may be added

* Media Disposition: Destroy

List of Containers

Add Delete

Number of Containers	Container Type	Container Description	Depth (inches)	Height (inches)	Width (inches)
<input type="checkbox"/> * 12	CD-A CD Jewel Case, Single Disc		5.625	4.938	0.250

PP

Details of the List of Containers

Total Number of Containers:	12	Total Container Volume (cubic feet):	0.048
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Populates from above

Save View PDF Cancel -- Select Next Action -- Go Delete

Search Create Tools

Transfer Request TR-0029-2011-0145

Status Draft

Save

View PDF

Cancel

-- Select Next Action --

Go

Delete

* = Required field

General Information Transfer Details Contact Information Related Assets Attachments

Transferring Agency Official

First Name: Artina
Title: Records Officer
Email: artv@census.gov

Last Name: Venning
Phone: 301-123-4567
Agency: Census

PP from user profile

Agency Approving Official

First Name:
Title:
Email:

Last Name:
Phone:
Agency:

IARA Contact

First Name:
Title:
Email:

Last Name:
Phone:
Agency:

SF 258 (Block 3B)

Other Contacts (Agency/IARA)

Add Delete

First Name	Last Name	Title	Phone	Email	Agency
SF 258 (Block 5E)					

Save

View PDF

Cancel

-- Select Next Action --

Go

Delete

Search Create Tools

Transfer Request TR-0029-2011-0145

Status Draft

Save View PDF Cancel -- Select Next Action -- Go Delete

* = Required field

General Information Transfer Details Contact Information **Related Assets** Attachments

Not on SF 258

Related Assets

No related objects found.

Save View PDF Cancel -- Select Next Action -- Go Delete

Search Create Tools

Search Home > Search Results >

Transfer Request TR-0029-2011-0145

Status Draft

Save View PDF Cancel -- Select Next Action -- Go Delete

* = Required field

General Information Transfer Details Contact Information Related Assets Attachments

Add an Attachment

File Name: Browse...

File Description: Upload

Click "Browse" →

Click "Upload" →

List of Attachments

Refresh

Attachment (ATT): 1 thru 1 of 1

Delete Selected Attachments

<< first < prev 1 next > last >>

	Attachment File Name	Attachment Description
<input type="checkbox"/>	TR_0029_2011_0145.docx	

NOTE: Attachments should include the Transfer Request number in the file name.

SF 258
(Block 14)

Search Create Tools

Search Home > Search Results >

Transfer Request TR-0029-2011-0145

Status Draft

Save View PDF Cancel Submit Go Delete

Choose "Submit" and Click "Go"

* = Required field

General Information Transfer Details Contact Information Related Assets Attachments

Add an Attachment

File Name: Browse...

File Description: Upload

List of Attachments

Refresh

Attachment (ATT):

1 thru 1 of 1

Delete Selected Attachments

<< first < prev 1 next > last >>

	Attachment File Name	Attachment Description
<input type="checkbox"/>	TR_0029_2011_0145.docx	

Search Create Tools

Search Home > Search Results >

Transfer Request **TR-0029-2011-0145** Status **Draft**

Save View PDF Cancel Submit Go Delete

* = Required field

General Information Transfer Details Contact Information Related Assets **Attachments**

Add an Attachment

File Name:
File Description:

Terms of Agreement for Submit Action

Please select the check box to indicate your acceptance and click Continue to proceed.

The records described above are deposited in the National Archives of the United States in accordance with 44 U.S.C. 2107. The transferring entity certifies that any restrictions on the use of these records are in conformance with the requirements of 5 U.S.C. 552. In accordance with 44 U.S.C. 2108, custody of these records becomes the responsibility of the Archivist of the United States at the time of transfer of the records. It is agreed that these records will be administered in accordance with the provisions of 44 U.S.C. Chapter 21, 36 CFR XII, 36 CFR Part 1256 and such other rules and regulations as may be prescribed by the Archivist of the United States (the Archivist). Unless specified and justified above, no restrictions of the use of these records will be imposed other than the general and specific restrictions on the use of the records in the National Archives of the United States that have been published in 36 CFR Part 1256 or in the Guide to the National Archives of the United States. The Archivist may destroy, donate, or otherwise dispose of any containers, duplicate copies, unused forms, blank stationary, non-archival printed or processed material, or other non-record material in any manner authorized by law or regulation. Without further consent, the Archivist may destroy deteriorating or damaged documents after they have been copied in a form that retains all of the information in the original document. The Archivist will use the General Records Schedule and any applicable records disposition schedule (SF 115) of the transferring agency to dispose of non-archival materials contained in this deposit.

Continue Cancel

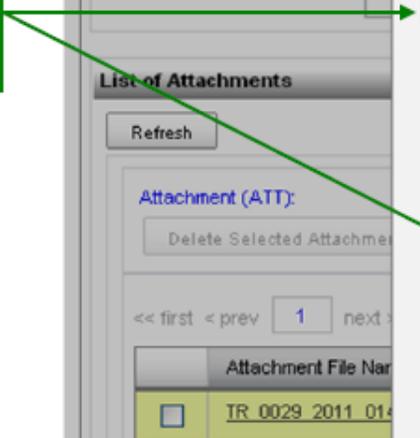
1 thru 1 of 1

Attachment (ATT):
Delete Selected Attachment

<< first < prev 1 next >

Attachment File Name
<input type="checkbox"/> TR_0029_2011_0145

Click checkbox and "Continue"



Search Create Tools

Search Home > Search Results >

Transfer Request **TR-0029-2011-0145** Status **Proposed**

* = Required field

General Information Transfer Details Contact Information Signatory Information Related Assets **Attachments**

Add an Attachment

File Name:

File Description:

List of Attachments

Attachment (ATT):

<< first < prev **1** next > last >>

	Attachment File Name	Attachment Description
<input type="checkbox"/>	TR_0029_2011_0145.docx	

1 thru 1 of 1

Message

Transfer Request TR-0029-2011-0145 has been successfully Submitted for Approval.

After clicking continue, you will see an on screen text message that confirms the Transfer Request has been successfully submitted for approval.

Search Create Tools

[Search Home](#) > [Search Results](#) >

Transfer Request TR-0029-2011-0145

Status Ready for Approval

Save View PDF Cancel

-- Select Next Action -- Go

General Information Transfer Details Contact Information **Signatory Information** Related Assets Attachments

* = Required field

Signatory Information

Date	Action	By	Title	Organization
7/22/2011	Submit	Paula.Larich.1 Paula.Larich.1	Test User.	test

Terms of Agreement

The records described above are deposited in the National Archives of the United States in accordance with 44 U.S.C. 2107. The transferring entity certifies that any restrictions on the use of these records are in conformance with the requirements of 5 U.S.C. 552.

In accordance with 44 U.S.C. 2108, custody of these records becomes the responsibility of the Archivist of the United States at the time of transfer of the records. It is agreed that these records will be administered in accordance with the provisions of 44 U.S.C. Chapter 21, 36 CFR XII, 36 CFR Part 1256 and such other rules and regulations as may be prescribed by the Archivist of the United States (the Archivist). Unless specified and justified above, no restrictions of the use of these records will be imposed other than the general and specific restrictions on the use of the records in the National Archives of the United States that have been published in 36 CFR Part 1256 or in the *Guide to the National Archives of the United States*.

The Archivist may destroy, donate, or otherwise dispose of any containers, duplicate copies, unused forms, blank stationary, non-archival printed or processed material, or other non-record material in any manner authorized by law or regulation. Without further consent, the Archivist may destroy deteriorating or damaged documents after they have been copied in a form that retains all of the information in the original document. The Archivist will use the General Records Schedule and any applicable records disposition schedule (SF 115) of the transferring agency to dispose of non-archival materials contained in this deposit.

Save View PDF Cancel

-- Select Next Action -- Go

Signatory Tab

ERA Transfer Request (TR) fields mapped to SF-258

SF 258 EXAMPLE—NOT VALID DOCUMENT

AUTHORIZED FOR LOCAL REPRODUCTION

AGREEMENT TO TRANSFER RECORDS TO THE NATIONAL ARCHIVES OF THE UNITED STATES		1. INTERIM CONTROL NO. (NARA Use Only)
TERMS OF AGREEMENT		
<p>The records described below and on the attached _____ pages are deposited in the National Archives of the United States in accordance with 44 U.S.C. 2107. The transferring agency certifies that any restrictions on the use of these records are in conformance with the requirements of 5 U.S.C. 552.</p> <p>In accordance with 44 U.S.C. 2108, custody of these records becomes the responsibility of the Archivist of the United States at the time of transfer of the records. It is agreed that these records will be administered in accordance with the provisions of 44 U.S.C. Chapter 21, 36 CFR XII, 36 CFR Part 1256 and such other rules and regulations as may be prescribed by the Archivist of the United States (the Archivist). Unless specified and justified below, no restrictions of the use of these records will be imposed other than the general and specific restrictions on the use of records in the National Archives of the United States that have been published in 36 CFR Part 1256 or in the <i>Guide to the National Archives of the United States</i>. The Archivist may destroy, donate, or otherwise dispose of any containers, duplicate copies, unused forms, blank stationary, non-archival printed or processes material, or other non-record material in any manner authorized by law or regulation. Without further consent, the Archivist may destroy deteriorating or damaged documents after they have been copied in a form that retains all of the information in the original document. The Archivist will use the General Records Schedule and any applicable records disposition schedule (SF 115) of the transferring agency to dispose of non-archival materials contained in this deposit.</p>		
2A. AGENCY APPROVAL Signature <u>Navy Records Officer</u> Date <u>6/5/11</u>	3A. NARA APPROVAL Signature <u>NARA Official</u> Date <u>7/1/11</u>	
2' Navy Records Officer Department of the Navy 1776 Blue Waters Way Anywhere, USA 12345	3' NARA Official 8601 Adelphi Road—Room 0001 College Park, MD 20740	

Agency
Approving
Official

SF 258 EXAMPLE—NOT VALID DOCUMENT

RECORDS INFORMATION

4A. RECORDS SERIES TITLE <u>Record Technical Report Files</u> Transfer Group Description		
4B. DATE SPAN OF SERIES <u>1/1/1981 to 12/31/1985</u> Inclusive Dates (Attach any additional description.)		
5A. AGENCY OR ESTABLISHMENT Creating Agency/Establishment <u>Department of the Navy</u>	9. PHYSICAL FORMS General Records Type	
5B. AGENCY MAJOR SUBDIVISION Major Subdivision <u>Office of Naval Research(ONR)</u>	<input checked="" type="checkbox"/> Paper Documents <input type="checkbox"/> Posters <input type="checkbox"/> Paper Publications <input type="checkbox"/> Maps and Charts <input type="checkbox"/> Microfilm/Microfiche <input type="checkbox"/> Arch / Eng Drawings <input type="checkbox"/> Electronic Records <input type="checkbox"/> Motion / sound / Video <input type="checkbox"/> Photographs <input type="checkbox"/> Other (specify): _____	
5C. AGENCY MINOR SUBDIVISION Minor Subdivision <u>Naval Research Lab(NRL)</u>	10. VOLUME: List of Containers/Detail of the List of Containers CONTAINERS: Cu. Mtr. _____ (Cu. Ft. <u>5</u>) Number <u>5</u> Type <u>FAC-5</u>	
5D. UNIT THAT CREATED RECORD _____	11. DATE RECORDS ELIGIBLE FOR TRANSFER TO THE ARCHIVES Transfer Disposition Date <u>11/2011</u>	
5E. AGENCY PERSON WITH WHOM TO CENTER ABOUT THE RECORDS Name <u>Gigi Jane</u> Contact Information Telephone Number <u>(301) 123-4567</u>	12. ARE RECORDS FULLY AVAILABLE FOR PUBLIC USE? <u>FOIA(b)(4)</u> Access Restriction Information <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO (If no, attach limits on use and justification.)	
6. DISPOSITION AUTHORITY: Former N1/NC1 Number <u>DAA-NLI-2011-0126-0001</u>	13. ARE RECORDS SUBJECT TO THE PRIVACY ACT? Access Restriction Information (If yes, cite Agency system Number and Federal Register volume and page number of most recent notice and attach a copy of this notice.) <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	
7. IS SECURITY CLASSIFIED INFORMATION PRESENT? <input type="checkbox"/> NO <input type="checkbox"/> YES LEVEL: <input type="checkbox"/> Confidential <input type="checkbox"/> Secret <input checked="" type="checkbox"/> Top Secret SPECIAL MARKINGS: <input type="checkbox"/> RD/FRD <input type="checkbox"/> SCI <input type="checkbox"/> NATO <input type="checkbox"/> Other Access Restriction Information INFORMATION STATUS: <input type="checkbox"/> Segregated <input type="checkbox"/> Declassified	14. ATTACHMENTS <input type="checkbox"/> Agency Manual Excerpt <input type="checkbox"/> Listing of Records Transferred <input type="checkbox"/> Additional Description <input type="checkbox"/> NA from 14097 or Equivalent <input type="checkbox"/> Privacy Act Notice <input type="checkbox"/> Microform Inspection Report <input type="checkbox"/> Other (specify): _____ <input type="checkbox"/> SF(s) 135	
8. CURRENT LOCATION OF RECORDS <input checked="" type="checkbox"/> Agency (Complete 8A only) Current Physical Location of Records <input type="checkbox"/> Federal Records Center (Complete 8B only)	8B. ADDRESS <u>Department of the Navy</u> <u>1776 Blue Waters Way</u> <u>Anywhere, USA 12345</u>	
8B. FRC ACCESSION NUMBER <u>N/A</u> Transaction Type/Transaction Number	CONTAINER NUMBER(S) <u>5</u>	FRC LOCATION <u>N/A</u> Location

SF 258 EXAMPLE—NOT VALID DOCUMENT

NARA PROVIDES

15. SHIPPING INSTRUCTIONS TO AGENCIES/REMARKS REGARDING DISPOSITION		RG 313
16. RECORDS ACCEPTED INTO THE NATIONAL ARCHIVES OF THE UNITED STATES Signature <u>NARA Official</u> Date <u>8/1/11</u>		17. NATIONAL ARCHIVES ACCESSION NO.



NATIONAL ARCHIVES AND RECORDS ADMINISTRATION

LTI: Legal Custody Accepted captured on the Legal Transfer Instrument (LTI) Signatory Tab, not on the Transfer Request

SF 258 (9/95)
Prescribed by NARA 36 CFR 1226