

Direct Offer Guidance

A direct offer is a transfer of permanent records from one of your agency's facilities to the National Archives. To initiate a direct offer, you must create and submit a Transfer Request in the [Electronic Records Archive \(ERA\)](#) system (or an [SF-258](#) if special circumstances merit use; see the [ERA Frequently Asked Questions](#) for more details). ERA system requirements are further explained in the [ERA Agency User Manual](#). Please note that ERA is an unclassified system.

You may notify Archives staff when you submit a new Transfer Request. Once we receive your form, we will review it for approval, and a member of our staff will contact you regarding next steps.

First Steps:

When you have located records that you would like to transfer to the National Archives, identify the approved [permanent records schedule](#) item that covers the records and confirming that the records have met all date and content eligibility requirements.

Each ERA Transfer Request must be linked in the system to a Disposition Authority or [Legacy Disposition Authority](#) and represent one records [series](#). Many [SF-115 record schedules](#) have already been entered into ERA as Legacy Disposition Authorities (DAL-prefix), but others have not. National Archives Records Management Services is responsible for systematically entering Legacy Disposition Authorities into ERA. To request entry of a Legacy Disposition Authority, send your request via email to legacy.schedule@nara.gov. Your request must contain a complete disposition authority citation (SF-115 job number and item number).

Before creating the Transfer Request, we recommend that you prepare the records for transfer by placing them in appropriate boxes and creating the required [finding aid](#). Generally, the majority of records can be packed in standard-size record boxes (14³/₄" x 12" x 9¹/₂") for legal- or letter-size files (NSN 8115-00-1178249 available via [GSA Advantage](#)). Please note that boxes exceeding these dimensions may not fit on National Archives shelving. If your records do not fit into standard boxes, please contact your accessioning archivist or [local archival facility](#) to discuss alternatives before choosing different-size boxes.

Please consider the following when packing your records:

- Please do not over-pack the boxes. Leave a 1- to 2-inch space in each box for ease of reference.
- Do not put additional material on the bottom, side, or top of the records in the box.
- You may include a copy of the finding aid in the first box of the transfer.

Create and Submit a Transfer Request:

Once you have prepared the records, please draft a Transfer Request form in ERA. Please be sure to attach the finding aid that you created, as well as any other [relevant documentation](#) [link to Attachment section of field-specific guidance].

Guidance on creating and submitting ERA Transfer Requests can be found in following documents:

[Form-specific guidance for direct offers](#)

[ERA Agency User Manual](#)

Section 7a: Fields in the General Information Tab, page 46

Section 7b: Fields in the Transfer Details Tab, page 53

Section 7c: Creating Transfer Requests, page 57

Section 7d: Drafting Transfer Requests using an Existing Transfer Request, page 65

Section 7e: Bulk Submission Process (SAMO), page 66

[ERA Transfer Process Training](#)

Once you have finished drafting your Transfer Request, please submit it to the National Archives. Transfer Requests that have been submitted to the National Archives will be in Ready for Approval status.

Review and Physical Transfer:

The National Archives regularly searches for newly submitted Transfer Requests in ERA. An accessioning archivist reviews each Transfer Request and finding aid and will contact you with any questions. If necessary, the National Archives may return the Transfer Request form to Draft status for additional agency action.

Once any questions are resolved, the National Archives will approve the transfer by updating the status of the Transfer Request to Ready for No More Shipments, and will contact you to arrange physical transfer of the records. If you have not been contacted by National Archives staff regarding the records within six weeks of submission, please contact the National Archives unit. Records should not be physically transferred to a National Archives facility until the Transfer Request has been approved and the method of physical transfer has been negotiated with National Archives staff.

Some common methods of physical transfer include:

- Shipping via USPS or equivalent. The National Archives unit may request information such as tracking numbers, mailing service, or shipping speed.
- Delivery to a National Archives facility. The National Archives unit may ask that you follow specific scheduling and receiving procedures.
- Pick-up by National Archives staff. This option is only available at some facilities.

The National Archives unit may request that you palletize large deliveries for transfer. Please refer to our palletization guidance for additional information.

National security classified records should be doubled wrapped and shipped in accordance with your agency security procedures as well as [32 CFR 2001.46](#) requirements. Please note that the National Archives unit may have additional requirements for palletization and physical transfer of classified materials.

Post-Transfer Actions:

After physically receiving the records, the National Archives will take [several actions](#) in the ERA system to capture updates to the transfer documentation and complete the accessioning process:

- Ready for Physical Custody Decision: This Transfer Request status indicates that the records have been received, but onsite review is not yet complete.
- Physical Custody Accepted: This Transfer Request status indicates that the National Archives has accepted physical custody of the records—this is the terminal status for the Transfer Request.

Once the Transfer Request is placed in Physical Custody Accepted status, the ERA system creates a Legal Transfer Instrument (LTI) for the records. The National Archives accepts legal custody of records by placing the Legal Transfer Instrument in Legal Custody Accepted status.