Agency Checklist for ERA 2.0 Launch

Log On (Began 4/17/2023)

☐ Obtain OMB Max Account - [https://portal.max.gov/portal/home](https://portal.max.gov/portal/home)
☐ Confirm you can log into ERA 2.0

Account Settings (Began 4/17/2023)

☐ Verify your established ERA roles have migrated to ERA 2.0
  ● Once you have logged into the system you can verify your account by selecting your name in the upper right corner of the screen and then you should see your assigned roles.

Record Schedules
In order for pending records schedules to appear on your dashboard, appraisers must return the schedules for revision. Please review and complete the following fields for each of your pending records schedules:

☐ General Information Section:
  ● Confirm Tribal Consultation field is completed. Select from the dropdown options as appropriate.

☐ For Each Item
  ● General Information section:
    ☐ Is this item a [Big Bucket](https://example.com)?
    ☐ Confirm Superseded authorities are cited correctly. See [Key for Records Schedule Numbering](https://example.com)
  ● Permanent Items: Additional Information section
    ☐ Are any records by this item subject to a FOIA exemption? If yes, select from dropdown
    ☐ Update Additional Information as needed. This may include editing records formats and volume
    ☐ Confirm frequency of transfer is correct
  ● Temporary Items: Additional Information section
    ☐ Are any of the records covered by this item national security classified?

☐ Make any additional revisions to the schedule as necessary

☐ Certify revised schedule to NARA

Transfer Requests
You may now edit existing or create new Transfer Requests and submit them to NARA for review.

NOTE: If you encounter any unexpected issues with records schedules please contact your appraisal archivist.

NOTE: If you encounter any unexpected issues with Transfer Requests please contact your accessioning archivist.