Bi-Monthly Records and Information Discussion Group

To Ask Questions
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Email:
rm.communications@nara.gov

February 14, 2023
BRIDG Agenda

- Chief Records Officer for the U.S. Government update
- Discussion of OMB/NARA Memo, Update to Transition to Electronic Records, (M-23-07)
- NARA Guidance Overview
- Federal Records Centers Program update
- NARA’s Electronic Records Archive (ERA) system migration update
## Current Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Timeframe</th>
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<tbody>
<tr>
<td>Agency Records Officer Credential (AROC) Renewal</td>
<td>January 3, 2023 and ongoing</td>
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<td>Six months to complete</td>
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<td>Federal Records Management Annual Reporting</td>
<td>January 9, 2023 to March 10,</td>
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<tr>
<td></td>
<td>2023</td>
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<tr>
<td>Capstone NA-1005 Resubmission</td>
<td>January 31, 2023 to April 30,</td>
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<td></td>
<td>2023</td>
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<tr>
<td>Preparing for ERA Shutdown</td>
<td>ongoing to mid-March</td>
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<tr>
<td>Meeting M-19-21 and M-23-07 Requirements</td>
<td>ongoing</td>
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• New date is June 30, 2024

• Goals are the same: manage records electronically and use commercial records storage facilities

• OMB and NARA are reviewing and approving exceptions

• Will issue another NARA Bulletin to support new memo
Questions?

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Guidance Updates

Lisa Haralampus
Director, Federal Records Management Policy and Outreach
<table>
<thead>
<tr>
<th>AC 22.2023</th>
<th>02/10/2023</th>
<th>Date for ERA Shutdown Delayed</th>
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<tbody>
<tr>
<td>AC 20.2023</td>
<td>01/20/2023</td>
<td>New Regulations on Electronic Messages</td>
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<tr>
<td>AC 18.2023</td>
<td>01/11/2023</td>
<td>General Records Schedule Transmittal 33 and Updates to GRS FAQs</td>
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<tr>
<td>AC 15.2023</td>
<td>01/06/2023</td>
<td>Preparing for ERA 2.0</td>
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<tr>
<td>AC 14.2023</td>
<td>01/05/2023</td>
<td>New NARA Bulletin Expanding Capstone for Electronic Messages</td>
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<tr>
<td>AC 13.2023</td>
<td>01/04/2023</td>
<td>Rescinding FAQ About Changes to Previously Approved Schedule Items</td>
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<tr>
<td>AC 10.2023</td>
<td>12/20/2022</td>
<td>Notification of ERA Shutdown and the ERA 2.0 Launch</td>
</tr>
<tr>
<td>AC 09.2023</td>
<td>12/16/2022</td>
<td>Announcing the Capstone Resubmission Cycle</td>
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Upcoming NARA Guidance

- Regulations with Digitization Standards for Permanent Records
- Digitization Supporting Guidance Products
- NARA Bulletin on Records Created on Collaboration Platforms
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Updates on ERA 2.0

David Lake
Program Manager, ERA

Sam McClure
Electronic Records Program Director
Timeline to Agency Use of ERA 2.0

- Project to migrate Records Schedule and Transfer Request forms data from the current ERA Base system to the revised versions of these forms in ERA 2.0 is nearing completion

- Final migration of data will require a pause in the use of ERA for a period estimated to be up to four weeks
  - If the migration project remains on schedule, we will stop use of the current ERA Base system in late March and launch ERA 2.0 in mid April

- As in our earlier updates – these are earliest possible timelines
  - Specific dates to be announced shortly
  - Any subsequent changes to dates will be communicated
User Accounts

- ERA 2.0 Agency user roles are same as current ERA roles (Records Scheduler, Certifying Official, Transferring Official, Approving Official)

- NARA will create accounts in ERA 2.0 for all current agency users of ERA based on current ERA user profiles

- PIV/CAC Authentication Requirements:
  - Active ERA 2.0 account and active OMB MAX.gov profile for PIV/CAC authentication
    - For users who do not have a PIV/CAC we can support with alternate authentication means
    - For assistance with MAX.gov profile issues – MAXSupport@max.gov
    - The ERA Help Desk (ERAhelp@nara.gov) is always a good point of contact
Communication

- AC 15. 2023 – Preparing for ERA 2.0

- More specific information coming in AC Memos

- System Notices (Emails to every ERA user from the ERA Help Desk)
  - Redirect from URL of original ERA

- Updated ERA information on archive.gov
  - Job aids, training content, account request forms, etc.
Support

- “Office Hours” – an open session for any issues related to ERA
  - First session will be held on the Friday of the first week of system use
  - More details to be shared soon

- Close monitoring of trouble tickets reported to the ERA Help Desk
We will continue to refine and update the timeline for the shutdown of ERA Base and the release of ERA 2.0 for Agency use.

We will continue to communicate whether we remain on the current schedule or have to postpone.
General Q&A

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NEXT MEETING
Tuesday
April 18, 2023
1:30 pm EST/10:30 am PST

All upcoming BRIDG meeting dates and previous recordings/slides are at:
archives.gov/records-mgmt/meetings/index.html
Technical Difficulties
Please Stand by

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