

2014 Annual Move: Tips on the Agency Review List

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Use ERA for the Annual Move

P2014 Annual Move



Agenda

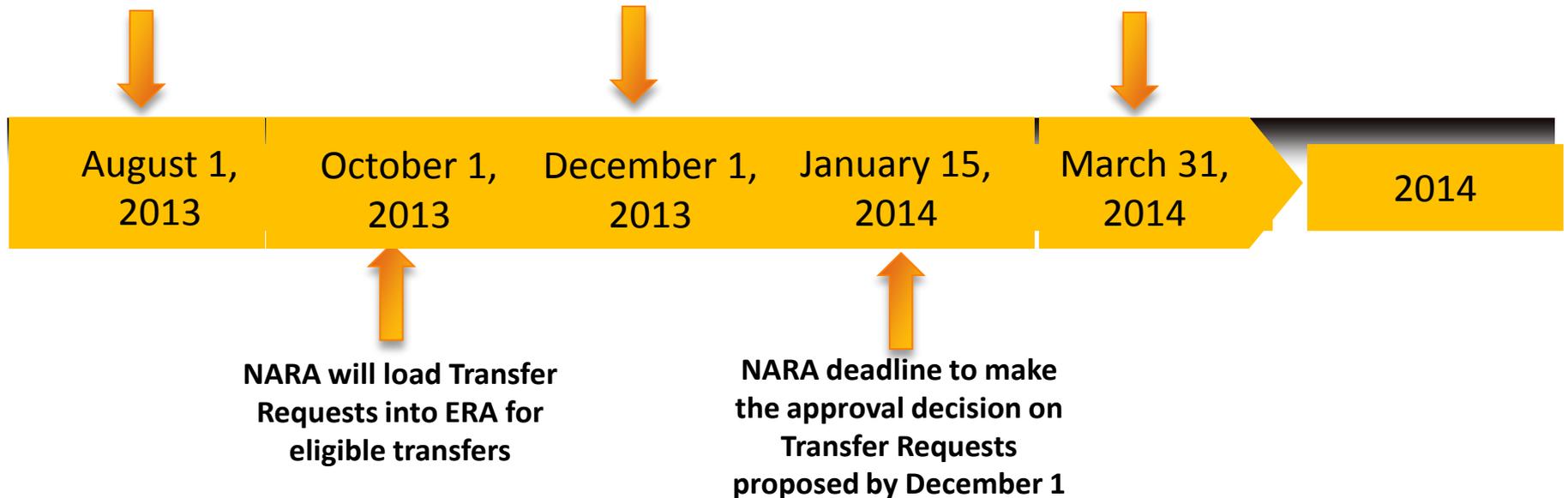
- What we'll talk about:
 - Annual Move in 2014 will be done in ERA
 - Timeline for the 2014 Annual Move
 - ARCIS fields that need to be reviewed
 - Additional ERA training and support
- What we won't talk about:
 - Questions about specific transfers or specific data
 - Specific questions about the ERA Transfer Request

2014 Permanent Records Move

Agencies will receive lists of potentially eligible FRC transfers for January 2014 for their agency

Agency deadline for proposing Transfer Requests to NARA for movement in the January-March quarter

Deadline for physical transfer of all records with NARA approved transfer requests



P2014 Agency Review List: ARCIS Fields

- Record Group
- Transfer # (or FRC accession #)
- Records Center (where records currently stored)
- Status
- Billable Volume (in cubic feet)

ARCIS Fields: Access Restriction Information

- Security Classification Type
- Security Level (Classification or Restriction)
- Access Restriction Code (who can access it now)
- Privacy Act (validate this independently)



ARCIS Fields: Disposition Information

- Disposition Authority
- Mixed Series
- Disposition Code
- Disposition Date



ARCIS Fields: Details About the Records

- Series Description
- Inclusive Start Date
- Inclusive End Date
- Type of Records
- Mixed Media



ARCIS Fields: Container Information

- Number of Containers
- Container Type
- Container Volume
- Container Numbers



ARCIS Fields: Agency Reference Information

- Disposition Citation
- Customer Reference Number
- Charge Code
- Charge Code Description

ARCIS Fields: A Couple More

- Begin Container Location
- Agency

ARCIS Fields: Retiring Office

- May be legacy data from the NARS-5 Records Officer Address (ROA) code fields
- May be retiring office information from the SF135 for “PT” ARCIS transfers



Legal Transfer: Some Agency Best Practices

- Follow your agency's guidance for transferring permanent records to the National Archives.
- Validate the information provided from ARCIS or in ERA.
- Make sure records have the correct disposition authority and series title.

Legal Transfer: Agency Best Practices Cont'd

- Determine if there are any special restrictions on the information such as:
 - sensitive business information or other FOIA exemptions,
 - national security information,
 - information subject to the Privacy Act,
 - use restrictions such as copyright,
 - any other restrictions on the records.



Legal Transfer: More Agency Best Practices

- Determine that the records are not needed for current agency business such as litigation discovery.
- Consult your FOIA office, security office and general counsel as needed.

Legal Transfer: And Remember

- Folder title list of the box contents or equivalent for non-electronic records.
- Documentation adequate to identify, service, and interpret electronic records and special media.
- Special media and electronic records have specific transfers instructions.
- See 36 CFR 1235, Transfer of Records to the National Archives of the United States.

ERA Support

- ERA Home Page at
- <http://www.archives.gov/records-mgmt/era/>
- ERA Training
 - On-line
 - ERA Manual & Work Aids
 - <http://www.archives.gov/records-mgmt/era/training-assistance.pdf> to propose agency-specific training

Annual Move Training

- Webinars on Using ERA for the Annual Move
 - October 9, 2013
 - October 17, 2013

Annual Move Questions:

- ARCIS data updates or questions about a particular FRC transfer OR
- About Reviewing Transfer Requests in ERA
- E-mail: annual.move@nara.gov



Contact: About Getting Started in ERA and User Accounts

ERA User Adoption

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Or your appraisal or accessioning archivist

Or the ERA Help Desk at 877-372-9594 or
ERAHelp@nara.gov