

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

General Information

Agency or Establishment	Department of State
Record/Scheduling Group	0059 - General Records of the Department of State
Records Schedule Applies To	Agency Subdivision
Major Subdivision	Bureau of Global Talent Management
Schedule Subject	Consolidated Schedule: Records of the Bureau of Global Talent Management (GTM)
Additional Schedule Information	<p>Flexible schedule that consolidates the records of the State Department Bureau of Global Talent Management (GTM). Applies to records 2012 and forward except for records related to State Magazine (item 0003). This schedule does not supersede existing records schedules for the Bureau, except for items 0010 and 0011, see items for details. Crosswalk with additional detail is attached to the schedule.</p> <p>The Bureau of Global Talent Management strives to recruit, retain, and sustain a diverse, talented, and inclusive workforce that is prepared to advance U.S. national security interests and American values in every corner of the world. Under the leadership of the Director General of the Foreign Service and Director of Global Talent Management the Bureau of Global Talent Management leads the recruitment, assignment, and career development processes to build an engaged and effective workforce.</p>
Is There a Classified Version of This Schedule?	No
Is consultation and coordination with Tribal Governments required?	Predate requirement

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Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
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Item Count

Total number of disposition items: 16

Number of Temporary disposition items: 13

Number of Permanent disposition items: 3

Number of Items with Disposition Not Approved: 0

Number of Inactive disposition items: 0

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Records Schedule Number: DAA-0059-2020-0021

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Outline of Records Schedule Items for DAA-0059-2020-0021

Item #	Title	Disposition
0001	Policy, Procedures, and Reports Files	Permanent
0002	Board of Examiners Program Files	Permanent
0003	State Magazine Historic Periodical	Permanent
0004	Casualty Assistance Case Files	Temporary
0005	Global Talent Management Coordination and Subject Files	Temporary
0006	Foreign Service Employees Grievance Case Files	Temporary
0007	Foreign Service Employees Discipline and Adverse Action Case Files	Temporary
0008	Foreign Service Employees Performance Case Files	Temporary
0009	Foreign Service Employees Retirement Case Files	Temporary
0010	Overseas Official Personnel Folders for Local Employees – Short Term (Left-Side)	Temporary
0011	Overseas Official Personnel Folders for Local Employees – Long Term (Right-Side)	Temporary
0012	Talent Acquisition Managing Directorate Job Vacancy and Appointment Files	Temporary
0013	Global Talent Management Operational and Support Files	Temporary
0014	Career Development and Assignments Files	Temporary
0015	Global Community Liaison Office Files	Temporary
0016	Employee Relations Care Coordination Files	Temporary

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REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Records Schedule Items

DAA-0059-2020-0021-0001		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	Policy, Procedures, and Reports Files	
Item Description	Records documenting the policies, procedures, plans, and guidelines in executing the global talent management program for the Department of State. Records include program activities and policy and procedural matters relating to recruitment and employment, the examination process, classification and position designation memorandums and reports, and performance evaluation. Records also include reports, meeting notices, meeting minutes, and correspondence and meeting files related to the Board of the Foreign Service; precepts and reports documenting activity of the Foreign Service Selection Board; Global Employment Management System monthly and annual reports; policy coordination historical and project reports files; and all related substantive documentation and meeting minutes, related to global talent management records.	
Is this item media neutral?	Yes	
Is this item a Big Bucket?	No	
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS		
Does this item supersede existing disposition authorities?	No	
Is this item a deviation from the GRS?	No	
DISPOSITION INSTRUCTION		
Final Disposition	Permanent	
Cutoff Instructions	Other: Cutoff at the end of calendar year.	
Are there multiple instructions for this item?	No	
Transfer Instruction	Transfer to the National Archives 25 year(s) after cutoff	
ADDITIONAL INFORMATION		
Current Records Format	Textual data:Unknown	
Approximate first year of records covered by this authority	2012	
Frequency of transfer	1	
Are any of the records covered by this item subject to a FOIA exemption?	No	

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Records Schedule Number: DAA-0059-2020-0021

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DAA-0059-2020-0021-0002		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	Board of Examiners Program Files	
Item Description	Records include Foreign Service Officer yearly written examinations, agendas and minutes of the Board of Examiners of the Foreign Service, reader reports, correspondence and memoranda related to the preparation and grading of Written Examinations, procedures for oral examinations, lists of candidates designated for appointment, and other related substantive material on examinations.	
Is this item media neutral?	No	
Media limitation	Digital only	
Is this item a Big Bucket?	No	
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS		
Does this item supersede existing disposition authorities?	No	
Is this item a deviation from the GRS?	No	
DISPOSITION INSTRUCTION		
Final Disposition	Permanent	
Cutoff Instructions	Other: Cutoff at the end of the calendar year.	
Are there multiple instructions for this item?	No	
Transfer Instruction	Transfer to the National Archives 25 year(s) after cutoff.	
ADDITIONAL INFORMATION		
Current Records Format	Textual data:Unknown	
Approximate first year of records covered by this authority	2012	
Frequency of transfer	1	
Are any of the records covered by this item subject to a FOIA exemption?	No	

DAA-0059-2020-0021-0003		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	State Magazine Historic Periodical	
Item Description	State Magazine periodical containing recent highlights, trends, news articles, interviews, and briefs on current topics and related issues.	

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Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Calendar year.
Are there multiple instructions for this item?	No
Transfer Instruction	Other: Transfer to NARA in 3-year blocks when newest records are 3 years old.
ADDITIONAL INFORMATION	
Current Records Format	Textual data:Unknown
Approximate first year of records covered by this authority	2000
Date span of the initial transfer	From: 01/01/2000 To: 12/31/2015
Frequency of transfer	3
Are any of the records covered by this item subject to a FOIA exemption?	No

DAA-0059-2020-0021-0004	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Casualty Assistance Case Files

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Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
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Item Description	<p>Casualty assistance case files related to Civil Service and Foreign Service personnel, including eligible family members, involved in serious injury, hospitalization, or death due to acts of terrorism, hostage affairs, or other distinctive activities that attract media, Congressional, or public interest. Records include, but not limited to notes, email communications, memorandums, explanation of benefits, condolence letters, and other records documenting service and administrative assistance. Specific case file documentation include:</p> <ul style="list-style-type: none"> • Copies of relevant electronic Official Personnel File documentation • Standard Form 50 • Beneficiary and Life Insurance Forms • Memorandums and notifications • Payroll & Compensation <ul style="list-style-type: none"> o Thrift Savings Plan o Unpaid compensation o Tax & Direct Deposition Information • Vital Record Documentation <ul style="list-style-type: none"> o Marriage Certificate o Birth Certificate(s) o Death Certificate
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cut-off at end of calendar year of case closure.
Retention Period	Destroy 5 year(s) after cutoff.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

DAA-0059-2020-0021-0005	STATUS: Active
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National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

ITEM GENERAL INFORMATION	
Item Title	Global Talent Management Coordination and Subject Files
Item Description	Records documenting the administration, management, and coordination of global talent management programs and functions. Records include, but not limited to, correspondence, reports, background studies, procedural documents, statistics, regulatory and procedural materials, correspondence, and administrative files documenting the awards and incentives process. Records also include talent acquisition files covering dossiers of foreign service candidates, student and fellowship program case and recruitment files, examination, and employment; policy coordination records including labor management relations, legislative files, and Employee-Management Commission Files; position and pay management; overseas employment subject and country files on local employee staff; records related to employee relations subject matters; Board of Foreign Service; procedures and guidance related to casualty assistance and crisis support; and related subjects.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff at the end of calendar year or upon final action.
Retention Period	Other: Destroy no earlier than 3 years and no later than 15 years after cutoff.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

DAA-0059-2020-0021-0006	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Foreign Service Employees Grievance Case Files

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Item Description	Records of grievance case files for Foreign Service employees. Records include but not limited to: <ul style="list-style-type: none"> • Grievance Case Files <ul style="list-style-type: none"> o Statements of grievance o Supporting documentation o Witness statements and interviews o Hearings o Referral documentation to the Foreign Service Grievance Board
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff at the end of calendar year of case closure.
Retention Period	Other: Destroy 15 years after cutoff.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

DAA-0059-2020-0021-0007	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Foreign Service Employees Discipline and Adverse Action Case Files

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Item Description	<p>Records of discipline and adverse action case files for Foreign Service employees. Records include but not limited to:</p> <ul style="list-style-type: none"> • Discipline Case Files <ul style="list-style-type: none"> o Recommended actions, employee’s reply o Hearings, and decisions o Supporting documentation o Records of appeals • Adverse Action Case Files <ul style="list-style-type: none"> o Proposed adverse action, employee’s reply o Witness statements o Hearings, and decisions o Letters of reprimand <p>Also included are tracking and reporting timeline information, reports of investigation, administrative inquiries, communications relevant to the allegations of misconduct, disciplinary or administration action, to include the resolution or final action taken.</p>
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff at the end of calendar year of case closure.
Retention Period	Other: Destroy 20 years after cutoff.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

DAA-0059-2020-0021-0008	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Foreign Service Employees Performance Case Files

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Item Description	Records consists of correspondence related to the submission of performance ratings and supplemental data for inclusion in the Foreign Service employee's performance folder. Records include comments concerning ratings, performance evaluation matters, rebuttal information, commendations, training reports, summary reports, and letters of reprimand. Also included is automated score card information such as biographic data, tenure dates, promotion history, rankings, skill codes, and related senior threshold board files.
Is this item media neutral?	Yes
Is this item a Big Bucket?	Yes
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Retention Period	Other: Destroy 10 years after date of separation from Foreign Service.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	
GAO Approval Required	No

DAA-0059-2020-0021-0009	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Foreign Service Employees Retirement Case Files

National Archives and Records Administration
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Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Item Description	<p>Records consists of application for retirement, staff studies on voluntary or disability retirement, correspondence and documentation related to contributions to the Foreign Service Retirement System, prior service credit, Civil Service Retirement deductions, appointment data, applicable annuitant and non-annuitant information, precedent and Board of the Foreign Service separation case files, and health benefit files.</p> <ul style="list-style-type: none"> • Optional Form 136 or equivalent • Survivor Entitlement • Name of Employer • Retirement date and type of retirement • Date of resignation • Appeal and denial letters • Transcripts and reports of hearings
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Retention Period	Other: Destroy 20 years after date of separation, death, attainment of age 62, or case closure.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

DAA-0059-2020-0021-0010	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Overseas Official Personnel Folders for Local Employees – Short Term (Left-Side)

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Item Description	Official personnel files of overseas which include Locally Employed Staff (LE Staff) and Eligible Family Members (EFMs) who are employed on either a Personal Services Agreement or a Personal Service Contract (PSC). Records include personnel files saved to the short-term folder of the eOPF or filed on the left-side of the hard copy OPF. Personnel files include requests for personnel action, referral letters, letters of reprimand, performance records such as approved award nominations, commendations, and training certificates. Records also include, but not limited, to short term records such as biographic data, position description, employment conditions, insurance benefits, and retirement agreements.	
Is this item media neutral?	Yes	
Is this item a Big Bucket?	No	
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS		
Does this item supersede existing disposition authorities?	Yes	
	Superseded Items	
Superseded Item	Item Superseded in Part?	Explanation
NC1-084-80-05/1/a	No	
Is this item a deviation from the GRS?	No	
DISPOSITION INSTRUCTION		
Final Disposition	Temporary	
Retention Period	Other: Destroy when superseded, obsolete, or upon separation or transfer of employee.	
ADDITIONAL INFORMATION		
Are any of the records covered by this item national security classified?	No	
GAO Approval Required	No	

DAA-0059-2020-0021-0011	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Overseas Official Personnel Folders for Local Employees – Long Term (Right-Side)

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Item Description	Records of separated Locally Employed Staff (LE Staff) and Eligible Family Members (EFM) who are employed on either a Personal Services Agreement (PSA) or a Personal Service Contract (PSC). These include records saved to the “permanent” folder in the eOPF or filed on the right side of the hardcopy OPF. Consists of record copies of documents covering the entire service as prescribed by Departmental guidelines. The Official Personnel Folder or its approved electronic equivalent documents the employee’s entire employment history.	
Is this item media neutral?	Yes	
Is this item a Big Bucket?	No	
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS		
Does this item supersede existing disposition authorities?	Yes	
	Superseded Items	
Superseded Item	Item Superseded in Part?	Explanation
NC1-084-80-05 /1/b/2	No	
N1-084-93-01 /1	No	
Is this item a deviation from the GRS?	No	
DISPOSITION INSTRUCTION		
Final Disposition	Temporary	
Cutoff Instructions	There is no cutoff instruction	
Retention Period	Other: Destroy when survivor or retirement claims are adjudicated or when records are 65 years old, whichever is sooner, but longer retention is authorized if required for business use.	
ADDITIONAL INFORMATION		
Are any of the records covered by this item national security classified?	No	
GAO Approval Required	No	

DAA-0059-2020-0021-0012	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Talent Acquisition Managing Directorate Job Vacancy and Appointment Files

National Archives and Records Administration
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Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Item Description	Records include documentation, correspondence, and dossiers of successful and unsuccessful Foreign Service reappointment and unsuccessful candidates who complete the Foreign Service assessment. Also included are qualification evaluation reports (QEP) and related summaries, scoring rating sheets, reports of oral examination, applications for designation to take written examinations, examination results, answer sheets, candidate biographic data, registers of candidates, statistical data, information on candidate experience, and suitability review panel (SRP) documentation.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cut off at the end of the calendar year of appointment determination or examination.
Retention Period	Destroy 7 year(s) after cutoff.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

DAA-0059-2020-0021-0013	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Global Talent Management Operational and Support Files

National Archives and Records Administration
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Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Item Description	<p>Working files including notes, correspondence, memoranda, reports, and related documentation on the Foreign Service Selection Board; position designation and classification; Overseas Employee Interagency Working Group meeting and correspondence; Civil and Foreign Service administrative matters at Post; Senior Executive Service staffing records such as Executive Resources Board files; Diplomatic-in-Residence Case and Subject Files, Office of Casualty Assistance forms, memorandums, and correspondence; and Office of Presidential Appointments and Title and Rank correspondence and summary files.</p> <p>Records also include State Magazine case production files used in the publishing of magazine content consisting of layouts, proofs, emails, and correspondence related to publication of the magazine.</p>
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff at the end of the calendar year.
Retention Period	Other: Destroy 3 years after cutoff.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

DAA-0059-2020-0021-0014	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Career Development and Assignments Files

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Item Description	Career Development and Assignment records consisting of policies and program-related correspondence involving entry-, mid-, and senior-level positions, including interagency liaison files and related documentation. Records include, but not limited to, open assignment system processing records; correspondence with agencies concerning available positions; assignments of foreign service personnel and agreements concerning such assignments; foreign service assignment applications, vetting, and bid data (currently processed through FSBid); and memoranda regarding assignments to functional bureaus both within the Department of State and other Federal agencies.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff at the end of the calendar year.
Retention Period	Destroy 5 year(s) after cutoff.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

DAA-0059-2020-0021-0015	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Global Community Liaison Office Files

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Item Description	Records of the Global Community Liaison Office consisting of subject and historical documents including reports and memorandums. Records also include evacuation, naturalization, employment program files, and Community Liaison Office country/posts and coordinator files consisting of, but not limited to: <ul style="list-style-type: none"> • Employment Counseling Records • Employment Opportunity Files • Functional Training Program and Request Records • Bilateral Work Agreements with Foreign Governments • Employment Case Files • Naturalization Case Files
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff at the end of the calendar year.
Retention Period	Destroy 10 year(s) after cutoff.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

DAA-0059-2020-0021-0016	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Employee Relations Care Coordination Files

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0021

Status: APPROVED
Date Approved: 04/14/2026

Item Description	Records documenting the coordination of care related to the Anomalous Health Incidents (i.e neurological attacks, HAVANA Act claims), including providing administrative support, policy input and guidance, assistance with workers' compensation benefit applications, facilitating interagency communications, and employee and eligible family member advocacy. Records include, but not limited to, correspondence, medical forms and documentation, employment files, interagency documentation, final decision memoranda, and payment-related records including vouchers and other substantive pay data.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cut off at the end of calendar year or case closure.
Retention Period	Destroy 25 year(s) after cutoff.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

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Date Approved: 04/14/2026

Signatory Information

Action	User	Date
Approve	Edward Forst (Acting Archivist)	04/14/2026

Schedule Crosswalk

ITEM	TITLE	NEW RETENTION	SERIES LEVEL CUTOFF INSTRUCTIONS (WHERE APPLICABLE)	CURRENT SERIES TITLE (INCLUDE FILE/MANUAL CODE IF APPLICABLE)	SUPERSEDED AUTHORITY	RELATED SERIES	RELATED RETENTION	*FOR PERMANENT RECORDS OFFICE OF RECORD
DAA-0059-2020-0021-0001	Policy, Procedures, and Reports Files	Permanent: Transfer to the National Archives 25 years after cut-off.	Cut off at the end of the calendar year.	Recruitment and Employment Policy Files and Procedures	N/A; 2012 forward	N1-059-00-07/5/a	Permanent. Retire to RSC when 10 years old for transfer to WNRC. Transfer to NARA when 20 years old.	Office of Talent Acquisition
				Examination Policy and Procedure Files	N/A; 2012 forward	N1-059-00-07/19/a	Permanent. Retire to RSC when 10 years old for transfer to WRNC. Transfer to the National Archives when 25 years old.	Office of Talent Acquisition
				Annual Report of the Board of Examiners for the Foreign Service	N/A; 2012 forward	N1-059-00-07/18/a	Permanent. Retire to RSC when 10 years old for transfer to WNRC. Transfer to the National Archives when 25 years old.	Office of Talent Acquisition
				Global Employment Management System (GEMS)	N/A; 2012 forward	N1-059-00-08/4/a	Permanent. Transfer data reflecting December personnel data for each calendar year beginning December 1971 in a format that meets NARA transfer requirements for electronic media at the time of transfer. (NC1-59-83-4, item 25a)	Office of the Executive Director
				Foreign Service Selection Board Precepts	N/A; 2016 forward	DAA-0059-2016-0004-0001	Permanent. Retain in office for 10 years. Retire to RSC in 1-year blocks for transfer to WNRC. Transfer to the National Archives when 25 years old in 5-year blocks. (Supersedes: N1-059-00-11, item 2a and N1-059-93-15, item 2)	Performance Evaluation

Schedule Crosswalk

ITEM	TITLE	NEW RETENTION	SERIES LEVEL CUTOFF INSTRUCTIONS (WHERE APPLICABLE)	CURRENT SERIES TITLE (INCLUDE FILE/MANUAL CODE IF APPLICABLE)	SUPERSEDED AUTHORITY	RELATED SERIES	RELATED RETENTION	*FOR PERMANENT RECORDS OFFICE OF RECORD
				Foreign Service Selection Board Final Reports	N/A; 2016 forward	DAA-0059-2016-0004-0002	Permanent. Retain in office for 10 years. Retire to RSC in 1-year blocks for transfer to WNRC. Transfer to the National Archives when 25 years old in 5-year blocks. (Supersedes: N1-059-00-11, item 2b)	Performance Evaluation
				Personnel Policy Historical File	N/A; 2012 forward	N1-059-00-12 /01/a	Permanent. Retain in the Policy Coordination Office (DPG/PC) for 10 years. Retire inactive files when 10 years old to RSC for transfer to WNRC. Transfer to the National Archives when 25 years old. (RRP-NN-464-7)	Office of Policy Coordination
				Project Reports on Personnel Policy and Planning	N/A; 2012 forward	N1-059-00-12/2/a/1	Permanent. Retire to RSC when 10 years old for transfer to WNRC. Transfer to the National Archives when 25 years old.	Office of Policy Coordination
				Board of the Foreign Service Meeting Files	N/A; 2012 forward	N1-059-00-01/5/a	Permanent. Retire to RSC when 5 years old for transfer to WNRC. Transfer to the National Archives when 20 years old (NC1-59-77-3, item 4)	Office of Policy Coordination
DAA-0059-2020-0021-0002	Board of Examiners Program Files	Permanent: Transfer to the National Archives 25 years after cut-off.	Cut off at the end of the calendar year.	FSO Written Examination Master File	N/A; 2012 forward	N1-059-00-07/9	Permanent: Retire to RSC every 5 years for transfer to the WNRC. Transfer to the National Archives when 25 years old. (NC1-59-80-20, items 1a and 1b)	Office of Talent Acquisition

Schedule Crosswalk

ITEM	TITLE	NEW RETENTION	SERIES LEVEL CUTOFF INSTRUCTIONS (WHERE APPLICABLE)	CURRENT SERIES TITLE (INCLUDE FILE/MANUAL CODE IF APPLICABLE)	SUPERSEDED AUTHORITY	RELATED SERIES	RELATED RETENTION	*FOR PERMANENT RECORDS OFFICE OF RECORD
				Master File of Agenda and Minutes of the Board of Examiners of the Foreign Service	N/A; 2012 forward	N1-059-00-07/10/a	Permanent. Retire to RSC when 10 years old for transfer to WNRC. Transfer to National Archives when 25 years old.	Office of Talent Acquisition
				Examination General Subject Files	N/A; 2012 forward	N1-059-00-07/11/a	Permanent. Retire to RSC when 5 years old for transfer to WNRC. Transfer to the National Archives when 25 years old. (NC1-59-80-20, item 3)	Office of Talent Acquisition
				Readers Reports on Written Examinations	N/A; 2012 forward	NC1-059-80-20/4/a	Permanent. Retire to RSC when 5 years old. Transfer to National Archives when 20 years old.	Office of Talent Acquisition
DAA-0059-2020-0021-0003	State Magazine Historic Periodical	Permanent: Transfer to NARA in 3-year blocks when newest records are 3 years old.	Cut off at the end of the calendar year.	State Magazine Historic Periodical	N/A; 1947 forward	N/A New Series	N/A New Series	Strategic Communications Unit
DAA-0059-2020-0021-0004	Casualty Assistance Case Files	Temporary. Destroy 5 years after case closure.	Cut-off at end of calendar year of case closure.	Casualty Assistance Case Files	N/A; 2012 forward	N/A New Series	N/A New Series	Office of Casualty Assistance

Schedule Crosswalk

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DAA-0059-2020-0021-0005	Global Talent Management Coordination and Subject Files	Temporary. Destroy no earlier than 3 years and no later than 15 years after cutoff.	Cutoff at the end of calendar year or upon final action.	Recruitment and Employment General	N/A; 2012 forward	N1-059-00-07 /1a	Temporary. Destroy when 10 years old. (NC1-59-80-5, item 1)	Office of Talent Acquisition
				Subject Files	N/A; 2012 forward	N1-059-00-14 /1/a	Temporary. Destroy when 10 years old.	Office of Overseas Employment
				Country Files	N/A; 2012 forward	N1-059-00-14 /2/a	Temporary. Destroy when 10 years old.	Office of Overseas Employment
				Overseas Employment (OE) Claims	N/A	N1-059-00-14 /5	Temporary. Retire to RSC 1 year after all claims in folder have been totally resolved on that individual. Destroy when 7 years old. (N1-059-88-30)	Office of Overseas Employment
				Labor Management Relations Files (Labor Management Relations General and Case files)	N/A; 2012 forward	N1-059-00-12 5/a/1/a	Temporary. Destroy 10 years after expiration of agreement.	Office of Policy Coordination
				Legislative Files	N/A; 2012 forward	N1-059-00-12 /4/a/1	Temporary. Destroy when 15 years old.	Office of Policy Coordination

Schedule Crosswalk

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				Employee Management Relations Commission Subject Files	N/A	N1-059-00-01 /6/b/1	Temporary. Retire to RSC when 3 years old for transfer to WNRC. Destroy when 10 years old.	Office of Policy Coordination
				General Subject File	N/A; 2012 forward	N1-059-00-08 /1/1	Temporary. Retire inactive files when 5 years old to RSC for transfer to WNRC. Destroy when 15 years old. (NC-59-75-7, item 11a)	Office of Organization and Talent Analytics
				Study/Project Files	N/A; 2012 forward	N1-059-00-17/6/a	Temporary. Retire to RSC 5 years after completion for transfer to WNRC. Destroy when 15 years old. Files may be maintained longer if needed for administrative use. (MRH 03/06/02)	Office of Organization and Talent Analytics
				Wage Survey Files	N/A	N1-059-00-14 /4/c/1	Temporary. Retire to RSC when 3 years old for transfer to WNRC. Destroy when 25 years old.	Office of Organization and Talent Analytics
				General Subject Files	N/A; 2012 forward	N1-059-00-13 /15/a/1	Temporary. Retire inactive material to the RSC when 10 years old for transfer to WNRC. Destroy when 15 years old. (NN-172-202, item 1a)	Career Development and Assignments
				Casualty Assistance Subject Files	N/A; 2012 forward	New Series		

Schedule Crosswalk

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				Crisis Support Procedures and Guidance Files	N/A; 2012 forward	New Series		
				Awards General Subject Files	N/A; 2012 forward	N1-059-00-11 /10/a/1	Temporary. Retire to RSC when 5 years old for transfer to WNRC. Destroy when 50 years old.	Office of Performance Evaluation
				Overseas Personnel System	N/A; 2012 forward	N1-059-00-08 /9/	Temporary. Cut off annually. Retain at Post for 5 years then transfer to RSC. Destroy after 5 years at RSC.	Office of the Executive Director
DAA-0059-2020-0021-0006	Foreign Service Employees Grievance Case Files	Temporary. Destroy 15 years after cutoff.	Cutoff at end of calendar year of case closure.	Foreign Service Grievance Files (Case Files)	N/A; 2012 forward	N1-059-00-15 /1/b/1	Temporary. Retire to RSC 1 year after case is closed for transfer to WNRC. Destroy 15 years after case is closed. (NC1-59-77-18, item 4b)	The Grievance Staff
				Foreign Service Grievance Files (Subject Files)	N/A; 2012 forward	N1-059-00-15 /1/a/1	Temporary. Retire to RSC 3 years after the cutoff. Destroy 15 years after cut off. (NC1-59-77-18, item 4a)	The Grievance Staff
DAA-0059-2020-0021-0007	Foreign Service Employees Discipline and Adverse Action Case Files	Temporary. Destroy 20 years after cutoff.	Cutoff at end of calendar year of case closure.	Discipline Case Files on Foreign Service and Civil Service Employees	N/A; 2012 forward	N1-059-00-10 /3/a	Temporary. Cut off file when case is closed. Retire to RSC 5 years after cutoff for transfer to WNRC. Destroy 20 years after cutoff.	Office of Employee Relations

Schedule Crosswalk

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				Grievance, Appeals and Disciplinary Tracking and Reporting (GADTRAKS)	N/A; 2012 forward	N1-059-00-10 /6	Temporary. TEMPORARY: Retain in HR/ER office. Delete individual case when active agency use ceases.	Office of Employee Relations
DAA-0059-2020-0021-0008	Foreign Service Employees Retirement Case Files	Temporary. Destroy 20 years after date of separation, death, attainment of age 62, or case closure.	N/A	Foreign Service Retirement Case Files	N/A; 2012 forward	N1-059-00-16 /1/a/1	Temporary. Retire to RSC 5 years after separation or attainment of age 62, whichever is earlier for transfer to WNRC. Destroy 20 years thereafter. (NN-174-26, item 1a)	Office of Retirements
				Foreign Service Retirement Case Files	N/A; 2012 forward	N1-059-00-16 /1/b/1	Temporary. Retire to RSC 5 years after death or attainment of age 62, whichever is earlier for transfer to WNRC. Destroy 20 years thereafter. (NN-174-26, item 1b)	Office of Retirements
				Foreign Service Retirement Case Files	N/A; 2012 forward	N1-059-00-16 /1/c/1	Temporary. Retire to RSC 8 years after case is closed for transfer to WNRC. Destroy 20 years after case is closed.(NN-174-26, item 1c)	Office of Retirements
				Foreign Service Retirement Case Files - Precedent Cases	N/A; 2012 forward	N1-059-00-16 /1/d/1	Temporary. Destroy 5 years after case is closed.	Office of Retirements

Schedule Crosswalk

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				Annuitant Service Record Card Files	N/A; 2012 forward	N1-059-00-16 /2	Temporary. Destroy 10 years after separation or when no longer needed for reference, whichever is sooner. (II-NN-3546, item 7)	Office of Retirements
				Non-Annuitant Service Record Card Files	N/A; 2012 forward	N1-059-00-16 /3	Temporary. Destroy 5 years after separation or when no longer needed for reference, whichever is sooner. (II-NN-3546, item 6)	Office of Retirements
				Foreign Service Former Spouse Health Benefit Files	N/A; 2012 forward	N1-059-00-16 /5/b/2/a	Temporary: Destroy 5 years after denial.	Office of Retirements
DAA-0059-2020-0021-0009	Foreign Service Employees Performance Files	Temporary. Destroy 10 years after date of separation from Foreign Service.	N/A	Performance Evaluation Case Files	N/A; 2012 forward	NC1-059-77-18 /5	Temporary. Destroy 5 years after separation of employee from the Foreign Service.	Office of Performance Evaluation
				Automated Score Card System	N/A; 2012 forward	N1-059-00-11 /5	Temporary. Temporary. Retain in HR/PE office. Delete when active agency use ceases. (NN-173-131, item 6)	Office of Performance Evaluation
				Official Personnel Folders (OPF - Foreign Service Performance Folders)	N/A; 2012 forward	N1-059-00-08 /11/b/1	Temporary. Retire to RSC 1 year after separation of employee for transfer to WNRC. Destroy 15 years after separation.	Executive Director GTM/EX/RIM
				Official Personnel Files	N/A; 2012 forward	NN-174-029 /1	Temporary. Retire to RSC 1 year after separation of employee. Destroy 15 years after separation.	Office Of Overseas Employment

Schedule Crosswalk

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DAA-0059-2020-0021-0010	Overseas Official Personnel Folders for Local Employees – Short Term (Left-Side)	Temporary. Destroy when superseded, obsolete, or upon separation or transfer of employee.	N/A	Personnel Folders of Non-American Employees	NC1-084-80-05 /1/a	N/A	Temporary. Destroy upon transfer of the Official Personnel Folder.	Office of Overseas Employment & Overseas Post
DAA-0059-2020-0021-0011	Overseas Official Personnel Folders for Local Employees – Long Term (Right-Side)	Temporary. Destroy when survivor or retirement claims are adjudicated or when records are 65 years old, whichever is sooner, but longer retention is authorized if required for business use.	N/A	Personnel Folders of Non-American Employees (Non-American Employees including Foreign Service Nationals and Third Country Nationals)	NC1-084-80-05 /1/b/2	N/A	Temporary. Retire to the Department Personnel Records Branch (HR/EX/RIM) 1 year after the date of separation or death of employee.	Office of Overseas Employment & Overseas Post
				Personnel Folders of Non-American Employees (Uncompensated Non-Americans)	N1-084-93-01 /1	N/A	Temporary. Send the original DS-693B and records to RSC and a copy of the DS-693B to HR/EX/RIM. These records are not sent to St. Louis. Transfer to WNRC after 1 year. Destroy 50 years after retirement from post.	Office of Overseas Employment & Overseas Post
DAA-0059-2020-0021-0012	Talent Acquisition Managing Directorate (TAC) Job Vacancy and Appointment Files	Temporary. Destroy 7 years after cutoff.	Cutoff at the end of calendar year of appointment determination or examination.	Dossiers-Foreign Service Reappointment Candidates	N/A; 2012 forward	N1-059-00-07 /3/a/1	Temporary. Retire to RSC 2 years after the year of reappointment for transfer to WNRC. Destroy when 7 years old.	Office of Talent Acquisition

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				Dossiers-Foreign Service Reappointment Candidates	N/A; 2012 forward	N1-059-00-07 /3/b/1	Temporary. Destroy 2 years from the date of most recent documentation.	Office of Talent Acquisition
				Dossiers - Successful Career (FSO) Candidates	N/A; 2012 forward	n1-059-00-07 /14	Temporary. Destroy 10 years after year in which appointment is made. (NN-173-128, item 2	Office of Talent Acquisition
				Summary and Oral Examination Rating Sheets	N/A; 2012 forward	NN-171-171 /2	Temporary. Destroy 5 years after date of examination.	Office of Talent Acquisition
				Application for Designation to Take Written Examination - Includes applications, biographic and other data submitted by candidate	N/A; 2012 forward	II-NNA-400, /9/a and /9/b	Temporary. Destroy 6 months from date of examination.	Office of Talent Acquisition
				Application for Designation to Take Written Examination	N/A; 2012 forward	II-NNA-400, /9/c	Destroy 1 year after date of examination.	Office of Talent Acquisition

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				FSO Written Examination Applications and Answer Sheets	N/A; 2012 forward	N1-059-00-07 /13	Temporary. Destroy after 6 months.	Office of Talent Acquisition
				Dossiers-Unsuccessful Specialist Candidates	N/A; 2012 forward	N1-059-00-07 /17/a/1	Temporary. Retire to RSC 2 years after the year of the oral examination for transfer to WNRC. Destroy when 7 years old. (NC1-59-83-6, item 5)	Office of Talent Acquisition
				FSO Written Examination Results	N/A; 2012 forward	NC1-059-00-07, /12	Temporary. Retire to RSC when 7 years old for transfer to WNRC. Destroy when 20 years old.(NC1-59-80-20, item 4b)	Office of Talent Acquisition
DAA-0059-2020-0021-0013	Global Talent Management Operational and Support Files	Temporary. Destroy 3 years after cutoff.	Cut-off at end of calendar year.	Foreign Service Selection Board – Working Files	N/A; 2016 forward	DAA-0059-2016-0004-0003	Temporary. Destroy when no longer needed.	Office of Performance Evaluation
				Position Designation File	N/A; 2012 forward	NN-166-054 /5	Temporary. Destroy when superseded or obsolete.	Office of Talent Services
				Foreign Service Grievance Files	N/A; 2012 forward	N1-059-00-15 /1/c/1	Temporary. Destroy when 2 years old or when no longer needed for reference purposes, whichever is sooner.	The Grievance Staff
				Employee-Management Relations Commission Subject Files	N/A	N1-059-00-01 /6/a/1	Temporary. Destroy when 3 years old.	Office of Policy Coordination

Schedule Crosswalk

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				General Subject Files	N/A; 2012 forward	N1-059-00-13 /15/b/1	Temporary. Destroy when 3 years old. (NN-172-202, item 1b)	Career Development and Assignments
				Classification General Subject and Organizational Files	N/A; 2012 forward	NN-173-138 /1/c	Temporary. Destroy when superseded or when case ceases to have value as a precedent.	Office of Talent Services
				Foreign Service Retirement Subject Files	N/A	N1-059-00-16 /6/a	Temporary. Destroy when 2 years old or when no longer needed, whichever is sooner.	Office of Retirements
				Senior Executive Service (SES) Staffing Files	N/A; 2012 forward	N1-059-00-09 /8/a	Temporary. Destroy after OPM audit or 2 years after personnel action is completed, whichever is sooner.	Civil Service Talent Management
				Great Seal of the United States (Working File)	N/A; 2012 forward	N1-059-00-13 /10/b/1	Temporary. Destroy when no longer needed for reference purposes.	Office of Presidential Appointments
				Selection Board Administrative Correspondence File	N/A; 2012 forward	NN-173-131 /4	Temporary. Destroy when 2 years old.	Office of Performance Evaluation
				Diplomat-in-Residence Case Files	N/A; 2012 forward	N1-059-00-07 /7/a	Temporary. Destroy when 3 years old.	Office of Talent Acquisition
				Diplomat-in-Residence General Subject Files	N/A; 2012 forward	N1-059-00-07 /6/a	Temporary. Destroy when 3 years old.	Office of Talent Acquisition

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DAA-0059-2021-0021-0014	Career Development and Assignments Files	Temporary. Destroy 5 years after cutoff.	Cut off at the end of the calendar year.	Open Assignment System	N/A; 2012 forward	N/A New Series	Temporary. Destroy 5 years after cutoff.	Career Development and Assignments
				Senior Assignments Board (SAB) records relating to Class 1 and 2 Foreign Service Career Officer - SAB Assignment Approval	N/A; 2012 forward	N1-059-00-13 /19/b/1	Temporary. Destroy when 4 years old.(NN-172-202, item 12b)	Career Counseling and Assignments
				Senior Assignments Board (SAB) records relating to Class 1 and 2 Foreign Service Career Officers - Memoranda approving change in assignments	N/A; 2012 forward	N1-059-00-13 /19/c/1	Temporary. Destroy when 1 year old.	Career Counseling and Assignments

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				Senior Assignments Board (SAB) Records Relating to Class 1 and 2 Foreign Service Career Officers - Memoranda recommending senior officer assignments	N/A; 2012 forward	N1-059-00-13 /19/a/1	Temporary. Destroy when 4 years old.	Career Counseling and Assignments
				Panel Agendas (now processed through FSBid)	N/A; 2012 forward	N1-059-00-13 /18/a/1	Temporary. Retire to RSC when 2 years old for transfer to WNRC. Destroy when 7 years old.	Career Development and Assignments
				Interagency Liaison Files	N/A; 2012 forward	N1-059-00-13 /20/a/1	Temporary. Destroy 3 years after agreement is terminated.	Career Development and Assignments
				Interagency Liaison Files	N/A; 2012 forward	N1-059-00-13 /20/b/1	Temporary. Destroy when 3 years old, (NN-172-202, item 13b)	Career Development and Assignments
				Interagency Liaison Files	N/A; 2012 forward	NN-172-202 /13/e	Temporary. Destroy when 2 years old.	Career Development and Assignments
DAA-0059-2020-0021-0015	Global Community Liaison Office Files	Temporary. Destroy 10 years after cutoff.	Cut off at the end of the calendar year.	Evacuation Files	N/A; 2012 forward	N1-059-00-18 /7/a	Temporary. Destroy 2 years after last action	Global Community Liaison Office
				Employment Program Files	N/A; 2012 forward	N1-059-00-18 /9/c/1	Temporary. Destroy when 3 years old, or no later than at end of tour of duty commenced following functional training. (NC1-59-84-3, item 9c)	Global Community Liaison Office

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				FLO Historical Documents	N/A; 2012 forward	N1-059-00-18 /12	Temporary. Destroy when 25 years old, or when no longer needed for reference, whichever is later.	Global Community Liaison Office
				Naturalization Case Files	N/A; 2012 forward	N1-059-00-18 /13/a	TEMPORARY. Retire to RSC 2 years after case is closed for transfer to WNRC. Destroy 15 years after separation line,	Global Community Liaison Office
				Employment Program Files	N/A; 2012 forward	N1-059-00-18 9/a/1	Temporary. Retain in FLO. Destroy 5 years after agreement is superseded.	Global Community Liaison Office
				Employment Program Files	N/A; 2012 forward	N1-059-00-18 9/d/1	Temporary. Destroy when 2 years old. Earlier destruction is authorized if no longer needed for administrative use.	Global Community Liaison Office
				FLO Subject Files	N/A; 2012 forward	N1-059-00-18 /2/a	Temporary. Destroy when 10 years old or sooner if no longer needed.	Global Community Liaison Office
				Community Liaison Office (CLO) Country/Post Files	N/A; 2012 forward	N1-059-00-18 /3/a	Temporary. Destroy when 2 years old or sooner if no longer needed.	Global Community Liaison Office
				Community Liaison Officer (CLO) Coordinator Files	N/A; 2012 forward	N1-059-00-18 /4/a/1	Temporary. Destroy 2 years after last action. (N1-059-88-13, item 2a)	Global Community Liaison Office
				Employment Program Files	N/A; 2012 forward	N1-059-00-18 9/b/1	Temporary. Destroy 1 year after last action. Earlier destruction is authorized if no longer needed for administrative use.	Global Community Liaison Office

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DAA-0059-2020-0021-0016	Employee Relations Care Coordination Files	Temporary. Destroy 25 years after cutoff.	Cutoff at the end of calendar year or case closure.	Employee Relations Care Coordination Files	N/A; 2012 forward	N/A New Series	Temporary. Cutoff at the end of calendar year or case closure. Destroy 25 years after cutoff.	Office of Employee Relations



Office of the Chief
Records Officer for the
U.S. Government

This schedule was signed outside of the ERA system using Standard Form 115.

NARA staff updated ERA to reflect this approval, moving the record schedule into an approved status. The approved status allows for generation of a PDF indicating that the schedule has been approved, and allows an agency to use the schedule in ERA to create transfer requests. The approved date in the system and on the PDF version of the records schedule reflects the system actions.