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NATIONAL ARCHIVES AND RECORDS ADMINISTRATION

# Bi-Monthly Records and Information Discussion Group

To Ask Questions

Chat via YouTube

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Email:

[rm.communications@nara.gov](mailto:rm.communications@nara.gov)



February 14, 2023



- 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



Agency Records Officer Credential (AROC) Renewal	January 3, 2023 and ongoing Six months to complete
Federal Records Management Annual Reporting	January 9, 2023 to March 10, 2023
Capstone NA-1005 Resubmission	January 31, 2023 to April 30, 2023
Preparing for ERA Shutdown	ongoing to mid-March
Meeting M-19-21 and M-23-07 Requirements	ongoing



# (M-23-07) Update on Transition to Electronic Records

- 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



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# Guidance Updates

**Lisa Haralampus**  
Director, Federal Records  
Management Policy and Outreach



# Recent NARA Guidance

<a href="#">AC 22.2023</a>	02/10/2023	Date for ERA Shutdown Delayed
<a href="#">AC 20.2023</a>	01/20/2023	New Regulations on Electronic Messages
<a href="#">AC 18.2023</a>	01/11/2023	General Records Schedule Transmittal 33 and Updates to GRS FAQs
<a href="#">AC 15.2023</a>	01/06/2023	Preparing for ERA 2.0
<a href="#">AC 14.2023</a>	01/05/2023	New NARA Bulletin Expanding Capstone for Electronic Messages
<a href="#">AC 13.2023</a>	01/04/2023	Rescinding FAQ About Changes to Previously Approved Schedule Items
<a href="#">AC 12.2023</a>	12/23/2022	OMB/NARA Memorandum Updating M-19-21 Due Dates
<a href="#">AC 11.2023</a>	12/21/2022	Release of NARA Bulletin 2023-01, Guidance on Storing Radiographic Film Records
<a href="#">AC 10.2023</a>	12/20/2022	Notification of ERA Shutdown and the ERA 2.0 Launch
<a href="#">AC 09.2023</a>	12/16/2022	Announcing the Capstone Resubmission Cycle

<https://www.archives.gov/records-mgmt/policy/memos-to-agency-records-officers.html>



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





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# Federal Records Centers Program Updates

**Christopher Pinkney**  
Acting Director  
Federal Records Centers Program



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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](mailto:MAXSupport@max.gov)
    - The ERA Help Desk ([ERAhelp@nara.gov](mailto:ERAhelp@nara.gov)) is always a good point of contact



## Communication

- AC 15. 2023 - Preparing for ERA 2.0  
<https://www.archives.gov/records-mgmt/memos/ac-15-2023>
- 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





# Agency Use of ERA 2.0

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](https://www.archives.gov/records-mgmt/meetings/index.html)



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# Technical Difficulties Please Stand by

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