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NATIONAL ARCHIVES AND RECORDS ADMINISTRATION

# Bi-Monthly Records and Information Discussion Group

**To Ask Questions**

Chat via YouTube

*or*

Email:

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



June 11, 2024



- Federal Records Center Program (FRCP) Updates
- Scheduling Guidance Updates
- Unauthorized Destruction Assessment Report Discussion
- Records Management Training Updates



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# Federal Records Centers Program (FRCP) Updates



**Tasha Ford**

Director

Federal Records Centers Program



# Questions

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# Scheduling Guidance Updates

**Andrea Riley**

Supervisor

Operations Research &  
Support Team (ACRS)



- Scheduling Guides provide advice on scheduling specific categories of records, usually based on function
- NARA issued the first guide, Scheduling Public Affairs Records, in 2016
- The new guides reformat some of NARA's existing guidance on:
  - Common permanent records
  - Personal data
  - Research and development records
  - Environmental health and safety records
- New guides cover legal and legislative records
- We expect to issue more of these guides as they are prepared
- See [AC 25.2024](#) for more information



# Instructions for Reviewing Agency Schedules

- NARA regulations require agencies to review records schedules that are ten years old or older every five years (see [36 CFR 1225.22a](#))
- We have provided instructions on how to use the Records Control Schedule repository (RCS) to identify and review agency records schedules
  - We do not recommend using ERA for this review as it does not contain item level data from pre-ERA schedules
- We encourage agencies to report inactive schedules to NARA so that we can update the RCS
  - Information on how to do this is also provided in the instructions
- See [AC 27.2024](#) for more information or contact [LSSP\\_Team@nara.gov](mailto:LSSP_Team@nara.gov)



# Guide to Inventorying, Scheduling and Disposition of Federal Records

- We are in the process of updating the [Guide to Inventorying, Scheduling and Disposition of Federal Records](#), also known as the ISD
- This guide is a web edition of the Disposition of Federal Records Handbook
- We are in the process of completely revising the ISD
  - Content will better address records scheduling in an electronic records environment
  - It will include step-by-step instructions and best practices for inventorying and scheduling records
  - The guide will also explain the appraisal process
- We expect the new ISD to appear in early FY2025





# Questions

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# **Unauthorized Disposition (UD) Safeguards RM Assessment**

**Andréa Noel**

Senior Records Analyst

Records Management Oversight and Reporting Program



# UD Safeguards Assessment

- Conducted during fiscal year 2023 with 7 agencies
  1. USDA – Agriculture Research Services
  2. DOD – Air Force
  3. DOD – Defense Logistics Agency
  4. DOD – Office of the Secretary of Defense
  5. DHS – US Coast Guard
  6. DOJ – Federal Bureau of Investigations
  7. Treasury – Internal Revenue Service
- **Focus:** Evaluation of policies, procedures, and practices related to 36 CFR 1230 & reported safeguards for 38 UD cases
- **UD Categories:** Accidental disposal/destruction, removal by departing employees, lost in transit, inadvertent loss of cellular data & unknown causation
- 9 recommendations



# UD Safeguards Assessment

- Summary of Recommendations
  - Develop & regularly disseminate RM resources related to UD incidents & reporting requirements agency-wide
  - RM programs should:
    - Lead standardized investigatory actions
    - Collaborate with relevant stakeholders during investigations, reporting & safeguard development & implementation
    - Monitor safeguard implementation for completeness
    - Communicate UD incidents and safeguards agency-wide
    - Balance implementation of long-term safeguards with immediate temporary ones
    - Regularly monitor implemented safeguards for effectiveness and respond to inefficiencies



# UD Safeguards Assessment

## Questions?

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Email: [RM.Communications@nara.gov](mailto:RM.Communications@nara.gov)



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# RM Training Updates





**Michelle Bradley, Supervisor**

**Rene Valero, Instructional Designer**

**Records Management Training Program**

## New and Revised ERA 2.0 job aids for transferring records are up!

- 14 new jobs aids
- [www.archives.gov/era/training](http://www.archives.gov/era/training)

Transferring Records			
Title	Description	Item Type	Date Updated
<a href="#">Create a Transfer Request - General Information Tab</a> 	This job aid tells you how to create a Transfer Request in ERA 2.0	Job Aid	6/5/2024
<a href="#">How to Add Tracking Numbers</a> 	This job aid tells you how to add tracking numbers to a Transfer Request in ERA 2.0.	Job Aid	6/5/2024
<a href="#">How to Add Transfer Details</a> 	This job aid explains how to add Transfer Details for a Transfer Request in ERA 2.0.	Job Aid	6/5/2024
<a href="#">Access Restrictions Sub-Section</a> 	This job aid explains how to complete the Access Restrictions sub-section under the General Information tab in ERA 2.0.	Job Aid	6/5/2024





## New Training: Records Management for Contractors

Launch Mid June 2024



### Records Management for Contractors

#### Advice Specific to Contractors about Federal Records



As a starting point, assume that you are creating records that are subject to federal requirements.

- **REVIEW** the specific details of your situation.
  - What is the scope of your workflow ?
  - What records are your company involved with?
- **REVIEW** your contract to determine if there are any unique recordkeeping requirements specific to your work. (for example - you work in electronic records...you need to produced records in a specific electronic format).
- **CONSIDER** any employee training that is required so that records are created, transferred and stored effectively.





## Federal Records Management

Home > Federal Records Management > Records Management Training Program > NARA Bulletins Formatted for Training

### Records Management Training Menu

- Federal Records Management
- Training Materials Catalog
- Online Lessons
- Records Management Instruction Support (ReMIS)
- Microlearning Lessons
- Training Videos
- Agency Records Officer Credential (AROC)
- Records Management Instruction Support (ReMIS)
- Other RM Training Resources

### By Role

- Senior Agency Officials for Records Management (SAORMs)
- Agency Records Officers
- Records Liaisons
- Records Custodians
- Legal Counsel
- Political Appointees & Senior Executives
- All Employees

## NARA Bulletins Formatted for Training

This page contains formatted bulletins to review as a lesson. Select the title of the bulletin. All bulletins can be downloaded into your LMS.

*\* Please note that the table below is searchable and sortable, click on any of the header cells to sort by that column:*

Show 10 entries

Search

Code	Title	Description	xxx
2023-01	Guidance on Storing Radiographic Film Records	SCORM	6/10/2024
2023-02	Expanding the Use of a Role-Based Approach (Capstone) for Electronic Messages	SCORM	6/10/2024
2023-03	Revoked NARA Bulletin on Media Neutral Processes	SCORM	6/10/2024
2023-04	Managing Records Created on Collaboration Platforms	SCORM	6/10/2024

Showing 1 to 4 of 4 entries

Previous 1 Next



# Reformatted NARA Bulletins



Search Archives.gov

RESEARCH OUR RECORDS

VETERANS' SERVICE RECORDS

EDUCATOR RESOURCES

VISIT US

AMERICA'S FOUNDING DOCUMENTS

## Federal Records Management

Home > Federal Records Management > Records Management Training Program

### Records Management Training Program

*Supporting the Development of Records and Information Management Professionals*

The Records Management Training Program provides five services that support records management training performed by Federal agencies.

#### Training Materials Catalog



Our [Training Materials Catalog](#) contains most of the training materials that we develop, including all of the new online lessons that are part of the new training curriculum that we call Curriculum 2.0.

**The catalog includes:**

- Online Learning
- ERA 2.0 eLearning Training Materials
- Microlearning Lessons
- Videos and Webinars
- Job Aids
- Other Resources
- Legacy Training Materials (Knowledge Area Courses)

#### Records Management Training



In 2020, the Records Management Training Program ended its in-person workshops and moved to an all-online, self-paced format. Now, you can take our records management training on your own schedule, for free.

Our Online Learning page [Online Lessons](#) gives you access to all of the training lessons we have developed. While we no longer offer the Certificate of Federal Records Management Training, everyone can explore training content on a variety of records management topics found in our [Training Catalog](#).

We are currently developing new training materials on a variety of topics. If you would like to suggest new topics and training products, send your ideas to [rmt1@nara.gov](mailto:rmt1@nara.gov).

#### NARA Bulletins Reformatted



NARA Bulletins: Formatted for Training Presentations and LMS Downloads.

#### Records Management Instruction Support (ReMIS)



Records Management Instruction Support (ReMIS) experts provide:

## NARA Bulletins Reformatted



NARA Bulletins: Formatted for Training Presentations and LMS Downloads.

To access the official NARA Bulletin website click [here](#).

[NARA Bulletins Formatted for Training](#)

## Are you and your staff logging into NARA's RM Training Program's Social Media accounts?

- Records Management Training Program promotes online training and RM resources on social media
  - New RM messages and guidance from NARA
  - Links to training materials
  - Highlight AROC recipients



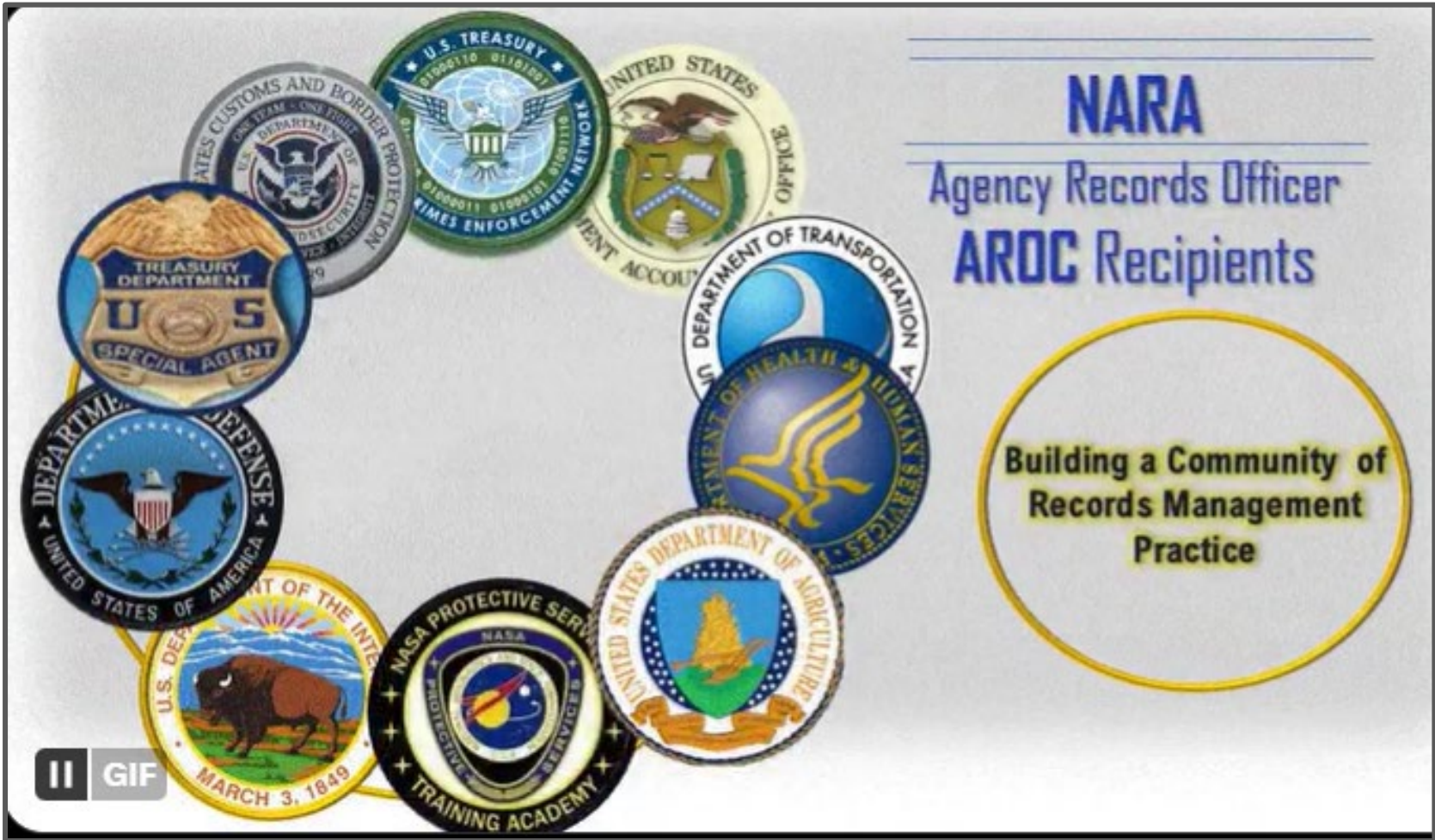
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[https://x.com/nara\\_rmtraining](https://x.com/nara_rmtraining)



# Highlight AROC recipients







# Highlight NARA Guidance and Bulletins

US National Archives Records Management Training Program 3 days ago · 🌐 ...

New Memo to Agency AROs about Deleting Draft Records Schedules from ERA 2.0.

Visit Link here:  
<https://www.archives.gov/records-mgmt/memos/ac-30-2024>  
@USState @USDA @USTreasury



Office of the Chief Records Officer

AC 30.2024

Date: June 07, 2024

**Memorandum to Federal Records Management Contacts:** Deleting Draft Records Schedules from ERA 2.0

After October 1, 2024, all records schedules in the status "draft" that were created prior to October 1, 2021 will be deleted from ERA 2.0. Moving forward, NARA will delete draft records schedules that are more than three years old on an annual basis.

Agencies are encouraged to review existing draft records schedules and take steps to finalize or delete them. We have created a job aid [How to Locate Draft Records Schedules](#). We have also created the [ERA 2.0 Schedule Data Entry Tool](#) to help agencies draft schedules outside of the system.

Please note that any draft records schedules created in ERA prior to October 1, 2020 were NOT migrated to ERA 2.0 (See [AC 22.2023](#)). If you have any questions, contact your assigned [NARA appraiser](#).

LAURENCE BREWER  
Chief Records Officer  
for the U.S. Government

National Archives and Records Administration  
8601 Adelphi Road, College Park, Maryland  
[Unsubscribe](#)  
[Manage Email Preferences](#)

US National Archives Records Management Training Program May 23 at 8:27 AM · 🌐 ...

New Instructions for How to Use the RCS for agency review of Records Schedules  
<https://www.archives.gov/.../schedu.../rcs-for-agency-review>



Office of the Chief Records Officer

AC 27.2024

Date: May 23, 2024

**Memorandum to Federal Agency Contacts:** Instructions for Reviewing Agency Schedules that are Ten Years Old or Older

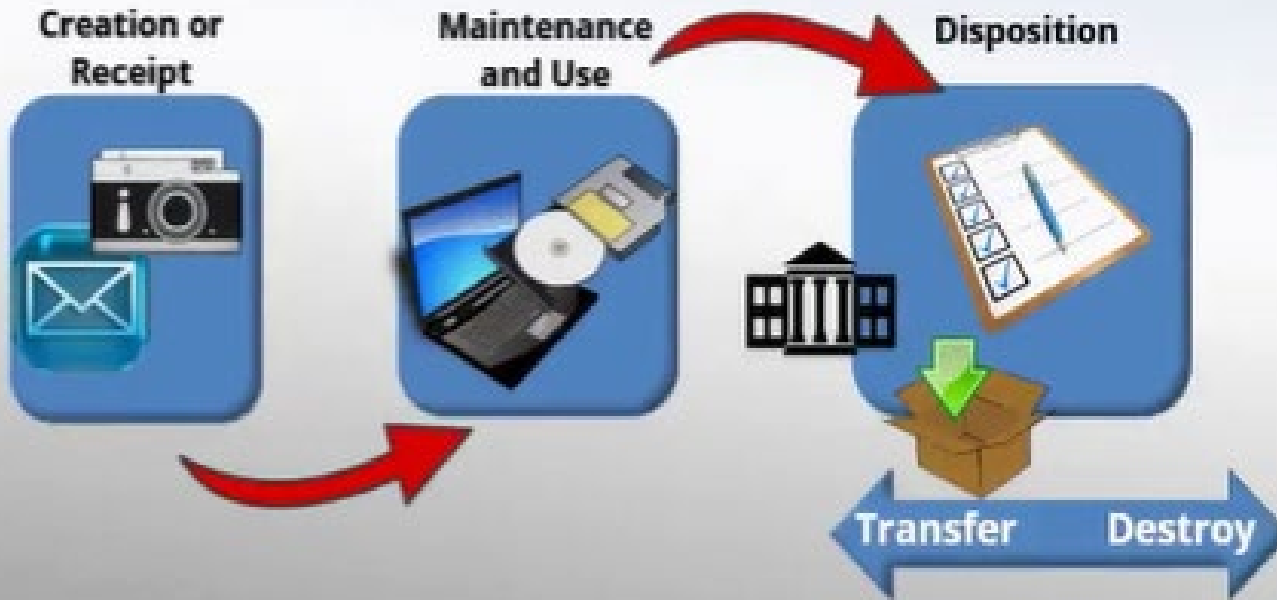
NARA regulations require agencies to review records schedules that are ten years old or older every five years (see [36 CFR 1225.22a](#)). We have developed [instructions](#) on how to use the [Records Control Schedule \(RCS\) repository](#) to help with this review. The instructions also include a job aid and a form for reporting inactive disposition items to NARA.

We encourage agencies to use these tools to conduct their review. If you report inactive disposition items to us we will update the RCS with this information.

If you have any questions, please contact [LSSP\\_Team@nara.gov](mailto:LSSP_Team@nara.gov).

LAURENCE BREWER  
Chief Records Officer  
for the U.S. Government

## Records Lifecycle



EXHAUSTED?

APRIL 2024

RECORDS MANAGEMENT  
MONTH

TRAINING RESOURCES

ARE STILL AVAILABLE !



Video/web training resources @  
<https://www.archives.gov/records-mgmt/training>





US National Archives Records Management Training Program

September 23, 2023 · 🌐




Identifying and retrieving federal records should be a top priority in your records program.

Download resources, training aids, and lessons 24/7 HERE:

<https://www.archives.gov/records-mgmt/training>

Anticipating  
frequent retrievals  
& searches???

Everyone needs  
a little brush up  
on their  
Records  
Management  
practices...



I really need  
to keep track  
of where I  
buried that  
bone !



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# Highlight images from NARA's catalog

*Fisher*  
~~FILE~~ COMMITMENT IN DISTRICT COURT.

In the District Court of the United States  
FOR THE WESTERN DISTRICT OF TEXAS.

Sitting at *Austin* Texas.

THE PRESIDENT OF THE UNITED STATES,

To the Marshal of the Western District of Texas GREETING:

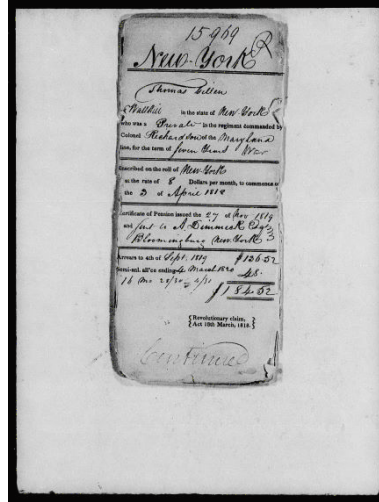
WHEREAS, on the *15* day of *July* 189*8*, in our said District Court it was ordered, adjudged and decreed by the Court in the matter of the United States vs *W.S. Porter* that the said *W.S. Porter* be temporarily committed to the County jail of *Travis* County Texas, pending trial of said case on an indictment filed July 10<sup>th</sup> 1896 - now on trial, for Embezzlement of *North Bank Funds*, of which he was duly convicted.

THESE ARE THEREFORE TO COMMAND YOU to take the body of the said *W.S. Porter* and commit him to the County Jail of *Travis* County, Texas, there to abide the sentence of our said Court. And the Jailor of *Travis* County, Texas, is hereby directed to receive the body of the said *W.S. Porter* into his custody and *keep* safely keep until discharged by due process of law, & to further order of this Court.

HERRIN FAIL NOT, but make due return of this Writ, showing how you have executed the same.

WITNESS the Honorable T. S. MAXEY, Judge of the said Court, and the Seal thereof hereunto affixed, at *Austin* Texas, this *15* day of *July* 189*8*.

*D. S. Clark* Clerk.  
*J. M. Hancock* Deputy.





# General Q&A

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**Chat via YouTube**

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



# **NEXT MEETING**

**Tuesday**

**August 13, 2024**

**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

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

Bi-Monthly Records and Information Discussion Group  
[archives.gov/records-mgmt/meetings/index.html](https://archives.gov/records-mgmt/meetings/index.html)