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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



October 8, 2024



- Federal Records Center Program (FRCP) Updates
- 2025 Annual Move of Permanent Records
- NARA/OPM Bulletin 2024-01: Exception for Official Personnel Folders and Employee Medical Folders
- Federal Records Management during Presidential Transitions
- 2024 Federal Annual Records Management Reporting



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Federal Records Centers Program (FRCP) Updates

Tasha Ford
Director

Federal Records Centers Program



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FY 2025 Interagency Agreements

Arthur B. Hawkins III

Director

Customer Relations Management



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FY 2025 Rates

Jefferson Lunsford
Chief Financial Analyst



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FRCP T&D Updates

Russell Loiselle

Director

FRCP Transfer & Disposition
Division



- COVID-19 Disposal Backlog eliminated
- FRCs disposed of almost 63,000 transfers totaling over **1,687,000** cubic feet in FY 24
- Disposition approved over 90 days old is down to 452,000 cubic feet (Post Pandemic Disposal)
- Nearly 4,500 eligible transfers are awaiting agency approval in CPDM and over 12,000 awaiting agency approval via NA-13001s or spreadsheet reports



- The M-23-07 “surge” of transfer requests in ARCIS resulted in over **20,000** requests being received during the 3rd quarter of FY24
- During the 4th quarter, we processed over 16,500 submitted requests and have just over 3,000 left to review
- AFC continuing to work with agencies on problem “post submitted” transfers
- NARA will continue to accept exception requests

- Physical 2024 Move 1 & 2 - Complete
- P2025 Agency Review of First Candidate List completed (over 11,000 accessions proposed)
- P2025 TRs Generated in ERA 2.0 on October 1
 - Agency review ends in December
 - Archives review and approval ends January 15
- P2026 proposed accessions are in the Annual Move Module and FRCs are reviewing and making necessary updates (by January 24)



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2025 Annual Move of Permanent Records

Derek Kennedy and Matt Eidson
Permanent Records Capture Team



2025 Annual Move

On October 1 NARA successfully loaded 11,539 of the 2025 candidate transfers in ERA 2.0 for agency review and submission.

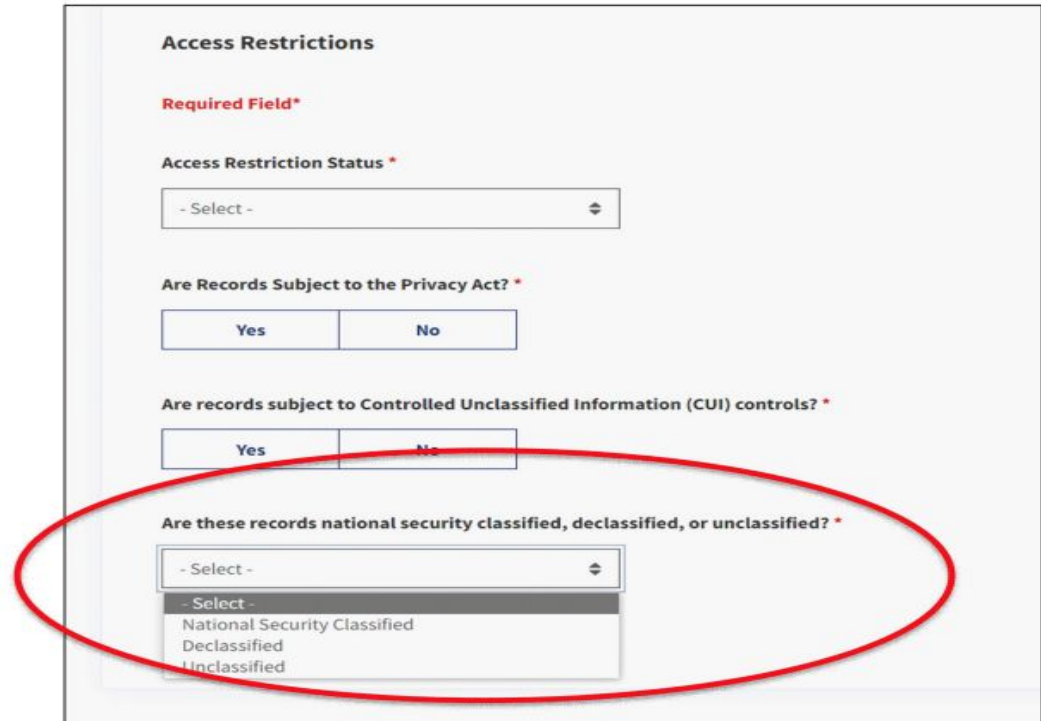
- NARA also loaded 365 transfers from the 2024 Deferred List
- This addition covers 36 agencies and 2,179 cubic feet

December 1 is the deadline for transfer requests to be proposed by agencies.

Please refer to [AC Memo 01.2025](#) for more details

New to 2025 TRs:

A new field in the access restriction section to update the National Security Classification Status



Access Restrictions

Required Field*

Access Restriction Status *

- Select -

Are Records Subject to the Privacy Act? *

Yes No

Are records subject to Controlled Unclassified Information (CUI) controls? *

Yes No

Are these records national security classified, declassified, or unclassified? *

- Select -

- Select -

National Security Classified

Declassified

Unclassified

Figure 1 Access Restriction Section – National Security question circled



▲ Required fields missing in the following sections:

Access Restrictions

- Are these records national security classified, declassified, or unclassified?

Figure 2 Access Restriction Required Fields Missing message



- ERA 2.0 Training Materials
<https://www.archives.gov/era/training>
- Accessioning Guidance and Policy
<https://www.archives.gov/records-mgmt/accessioning>
- Annual Move of Permanent Records
<https://www.archives.gov/records-mgmt/accessioning/annual-move-2022>
- Classified Permanent Records Training and Resource
<https://www.archives.gov/records-mgmt/accessioning/annual-move-2022-0>



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NARA/OPM Bulletin 2024-01: Exception for Official Personnel Folders and Employee Medical Folders

Lisa Haralampus

Director, Policy and Outreach

Tammy Hudson

OPM Records Officer



OPF-EMF Exception Status Update

[NARA OPM Bulletin 2024-01:](#)

Limited Exception for Sending
Official Personnel Folders (OPFs)
and Employee Medical Folders (EMFs)
to the National Personnel Records Center (NPRC)

Issued September 10, 2024

For OPFs, see [GRS 2.2](#): Employee Management Records.

- For long-term OPF records, GRS 2.2, item 40, mandates a **129-year retention** period (shorter when survivor or retirement claims are adjudicated)
- For short-term OPF records, GRS 2.2, item 41, mandates destruction when **superseded, obsolete, or the employee has separated or transferred**. Short-term OPF records are not transferred to the NPRC.

For EMFs, see [GRS 2.7](#): Employee Health and Safety Records

- For EMF records, GRS 2.7 mandates a **30-year retention** after an employee separates or when the OPF is destroyed.



What and When

There are two exceptions:

- OPFs may continue to be sent to NPRC through **June 30, 2025**
- EMFs may continue to be sent to NPRC through **June 30, 2027**

- The only government-wide exception
- Any federal agency may use the exception
- Intended for agencies not yet using to OPM's eOPF system
- Intended for use until OPM is able to accept EMFs electronically

Contact NPRC at civiliantransfer&disposal@nara.gov with projections of cubic feet and shipping dates

- NARA, OPM, and OMB are working together to support fully electronic federal personnel records.
- Since early 2000s, OPM has been developing and supporting the eOPF system
- Federal regulations required agencies to send personnel records to the NPRC, creating a dual record keeping practice
- This exception gives the federal government more time to transition to fully digital personnel records



- Agencies using the eOPF system no longer need to send paper OPFs to NPRC
- Agency Records Officers and Chief Human Capital Officers should connect to discuss any issues with the guidance or exceptions
- OPM is continuing eOPF on-boarding and creating EMF functionality
- NARA is planning regulatory updates



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Federal Records Management during Presidential Transitions

Andria Leo

Electronic Records Policy Analyst
Policy and Program Support Team

NARA's Role, Office of the Chief Records Officer Role

- Office of the Federal Register
- Presidential Records Act
- Federal Records Act
 - Records in federal agencies
 - Remind agencies of their records management responsibilities
 - Work with the Partnership for Public Service (PPS), GSA, OPM, OGE, FBI, and NARA's Agency Transition Director



NAID: 45644331

Why Transitions Matter

- Employees transitioning means records transitioning
- Ensure employees aware of federal records responsibilities
- Follow federal records laws and regulations
- We highlight:
 - Electronic messages
 - Social media
 - Taking records or copies
 - Talking with Records Officers



Agency Transition Resources

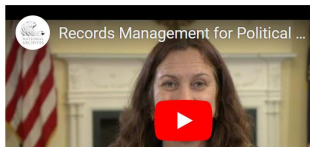
- GSA's Presidential Transition Directory
 - [Federal Records & Transition-Specific Briefing Materials](#)



Records Management Guidance for Political Appointees and Senior Officials

As a political appointee, you may enter and leave federal service with the change of administrations that occurs during Presidential Transitions. As a public servant, you have a duty to manage the records and information you create and receive. Records management is required by law.

Many records created and received by political



Transition Re
GSA's Presidential T
Directory - Federal F
Management Guidel
Records Managemen
Federal Employees
Handout on Record:
Guidance for Politic
Employees

- New NARA web content:
 - [Political Appointees and Senior Officials](#)
 - [Federal Employees](#)
 - [Handout for Political Appointees](#)
 - [Model Entrance and Exit Checklists](#)



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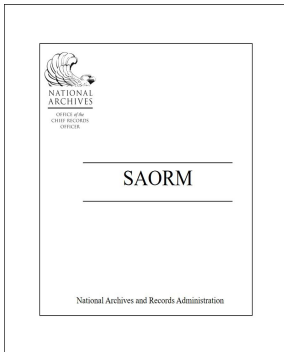
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2024 Federal Annual Records Management Reporting Cycle

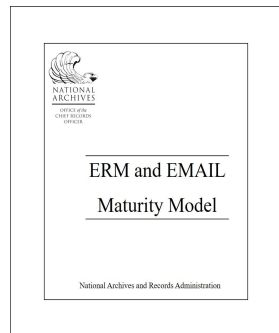
Karyn Skevakis

Supervisory Archives Specialist
Records Management Oversight



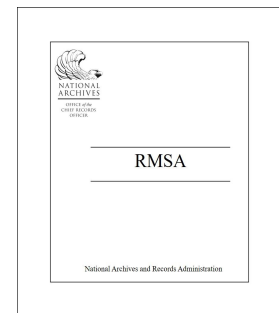
SAORM

Senior Officials' perspective on progress on strategic records management initiatives, including actions taken to promote fully electronic recordkeeping. Individual SAORM reports, including the template, are available online



ERM & EMAIL

Agency records officers assess their individual agency's electronic records and email management using a risk-based maturity model template based on Universal ERM Requirements and NARA's published success criteria. Downloadable spreadsheet available online.



RMSA

Measures compliance with federal records management statutes and regulations Compliance with this framework ensures agencies can document decisions and activities for their business and mission functions



Federal Agency Records Management Reporting 2023

- Reporting period ran January 8th through March 8th 2024
- Covering activities in CY 2023
- Response Rate
 - For all three reports, we received a 97-99% response rate
 - Records Management Self-Assessment = 98%
 - Federal Electronic Records and Email Management = 97%
 - Senior Agency Official for Records Management = 99%
- Annual Report in final NARA review
 - Will send out an AC Memo when published and finalized



CY 2024 Reporting Cycle

- Agency reporting
 - January 13 – March 14 2025
- Analysis, validation, draft report
 - March – June 2025
- CY 2024 review and dissemination
 - July – September 2025



Further Information/Questions

If you have any questions or need any additional information, please email the contact NARA's Records Management Oversight and Reporting Team at rmselfassessment@nara.gov.



General Q&A

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NEXT MEETING

Tuesday

December 10, 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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[archives.gov/records-mgmt/meetings/index.html](https://www.archives.gov/records-mgmt/meetings/index.html)