

Transfer Records via the Annual Move

Instructions for Using This Job Aid

Use this job aid when you are assigned to transfer records via the Annual Move. Check off each step when you have completed the step.

Procedure	Actions/Decisions	
1. Validate disposition of records eligible for transfer to NARA (1 July – 1 Sept.)	1. Receive ARCIS list of records eligible for transfer to NARA.	<input type="checkbox"/>
	2. Compare list to internal list and records schedule to validate that all records proposed for transfer are eligible. Note any discrepancies on a spreadsheet. Give spreadsheet to ARO.	<input type="checkbox"/>
	3. Obtain internal approval from Agency RM Management and record owners for transfer of legal custody of records to NARA. (Only for records without discrepancies)	<input type="checkbox"/>
2. Initiate Transfer Request in ERA (1 Oct-1 Dec)	1. Submit Transfer Request for records in ERA.	<input type="checkbox"/>