## 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.*

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| **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. | ☐ |
| 1. 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. | ☐ |
| 1. Obtain internal approval from Agency RM Management and record owners for transfer of legal custody of records to NARA. (Only for records without discrepancies) | ☐ |
| **2. Initiate Transfer Request in ERA (1 Oct- 1 Dec)** | 1. Submit Transfer Request for records in ERA. | ☐ |