Transfer Request: General Information

The General Information tab opens with two required fields, (1)***Agency or Establishment*** and (2) ***Record Group***. These fields are auto populated from the **Create New Transfer Request** dialogue window. A screen capture of General Information tab is displayed below.

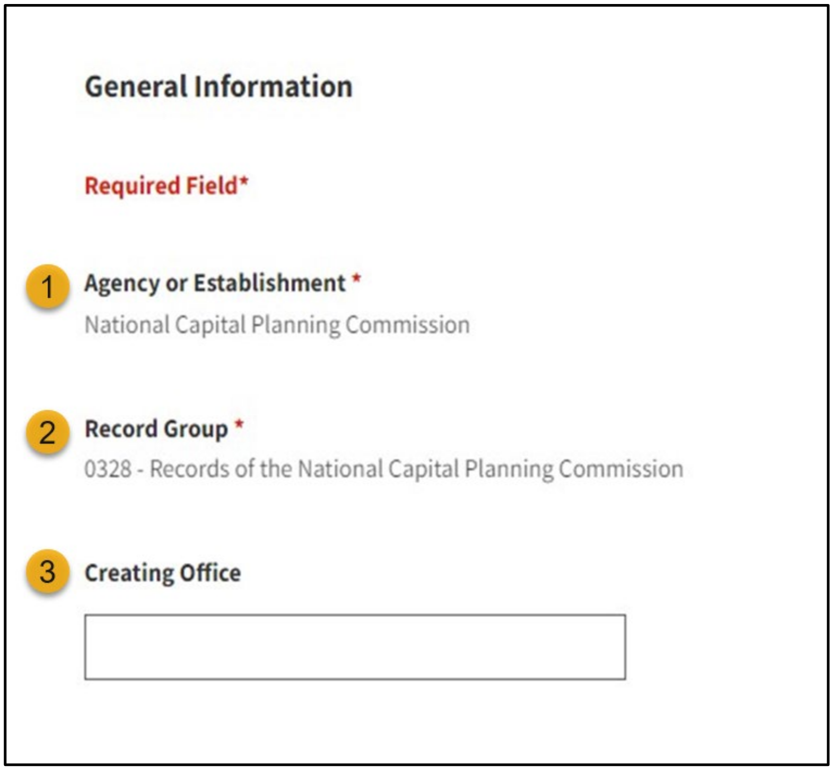

Figure 1 The General Information Tab

Review both fields for accuracy. If there are any errors, return to the previous screen to correct them.

Next, you have the option to enter a (3) ***Creating Office*** if you would like to provide more context for your transfer. You may leave this field blank.

Click the ***Next*** button. The **Series** section appears.

Series

Use the **Series** section of the **General Information** tab to identify records schedule series/items that will be included in the transfer to NARA.

1. Enter the ***Accession*** Title in the text field.

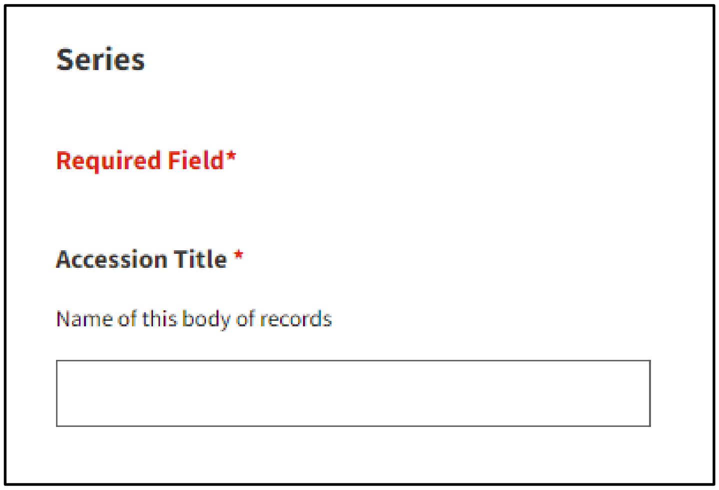

Figure 2 Series Section - Accession Title Field

Create a brief ***Accession Title*** that accurately reflect the records you are transferring.

2. Complete the Date Span of Records – ***From field***. (Only the year is mandatory.)
3. Complete the Date Span of Records – ***To field***. (Only the year is mandatory.)
4. Select Disposition Authority Number under the Disposition Authority List header.
5. Click the ***Disposition Authority Number*** button that displays under the **Disposition Authority List** header. The **Disposition Authority Lookup** dialog box displays.

Transfer Requests must be linked to an active disposition authority.

Disposition Authority Lookup

Use the Disposition Authority Lookup tool to search and add additional permanent Records Schedule Item(s) to the Transfer Request.

1. Use the ***filters*** displayed at the top of the dialog box to view only those disposition authorities associated with your **Agency/Record Group**.

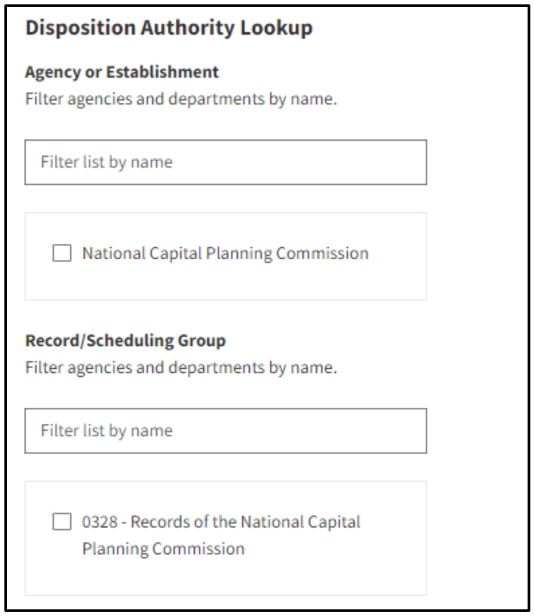

Figure 3 Disposition Authority Lookup Tool Filters

2. Select the ***disposition authority number*** you want to link to the Transfer Request.
3. Click ***View More*** at any time to see additional items.

> ***NOTE:*** Many, but not all, active permanent disposition authorities are in ERA 2.0. If you are unable to locate the ***disposition authority***, for your ***Transfer Request***, review Searching for Legacy Schedules (DALs) in ERA 2.0.

The *ERA Base Legacy Records Schedules Report* identifies legacy records schedules and items and currently serves as a temporary crosswalk for users.

The report is only accurate as of March 2023; some schedules/items have since been superseded by new schedules/items. For more information, go to the ERA Legacy Schedule web page.

4. Click the ***Add Disposition Item(s)*** checkboxes.
5. Select the transfer type from the **Type of Legal Transfer** drop-down menu.

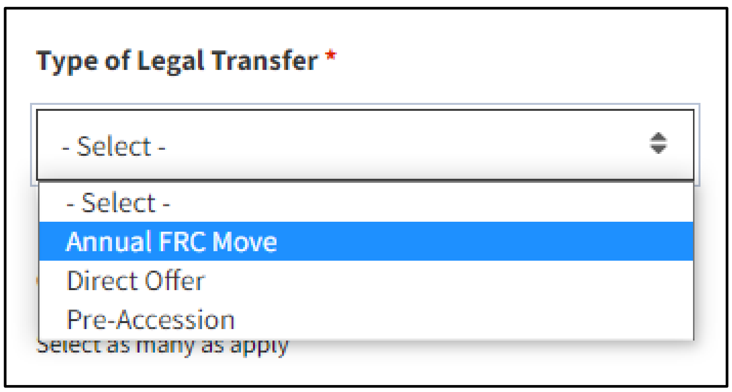

Figure 4 Type of Legal Transfer Drop-down Menu

The **Type of Legal Transfer** drop-down menu options include:

- ***Annual FRC Move***: Records stored at a Federal Records Center (FRC) that are included in NARA's Annual FRC Move. The majority of Annual FRC Move transfers are system generated.
- ***Direct Offer***: Transfers initiated by your agency for records located in agency facilities.
- ***Pre-Accession***: Electronic records approved for legal transfer to NARA at a future date. If you select this option, complete the Pre-Accession: Date eligible for Legal custody field that displays.

6. Select the ***Record Type(s)*** under the **General Records Type**.
7. Click the ***Next*** button. The **Tracking Numbers** section appears.