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NARA's Agency Services Bim Records and Information Dis Group (BRIDG)

Wednesday, April 15, 2015



Today's Meeting Agen

- **Records Management OPM Job Series Overview** ~ Lisa Supervisor, Records Management Policy Team
- **ERA, User Account Management and Annual Move U**
Cathy Westfeldt, Supervisor, Systems Integration Design and Adoption Team, and Lynn Stewart, Lead, Annual Coordinating Group
- **Updates on ARCIS Training and Forthcoming Develop**
John McEvoy, Management Analyst, Federal Records Centers Program



Q&A Process for Dial-In Attende

- To ask a question, remote attendees should email: rm.communications@nara.gov
- Questions will be asked and responded to during the meeting and/or post-meeting as time permits.



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Records and Information Management Occupation Series Flysheet (0308) Released!

Lisa Haralampus

Director, Federal Records Management Policy
Office of the Chief Records Officer for the U.S.
Government



OPM Statement...

“Establishment of this new series brings into focus the records and information management workforce using one occupational series to provide consistency in describing, classifying, and recruiting for records and information management specialists across the Federal Government.”

*- Kimberly A. Holden, OPM Deputy Associate
, Recruitment & Hiring, March 10, 2015*

Director

<http://www.chcoc.gov/transmittals/TransmittalDetails.aspx?Transmit>



UNITED STATES OFFICE OF PERSONNEL MANAGEMENT
Washington, DC 20415

MEMORANDUM FOR CHIEF HUMAN CAPITAL OFFICERS
Kimberly A. Holden
Deputy Associate Director, Recruiting

From: **Kimberly A. Holden**
Deputy Associate Director, Recruiting

Subject: **Final Position Classification Flysheet
Information Management Series, 0308**

The U.S. Office of Personnel Management (OPM) is releasing the Records and Information Management Series, 0308. On November 10, 2014, the President signed the Fiscal Year 2015 Management and Budget and the Archivist of the United States issued a Government Records Directive (M-12-18) to satisfy the OPM to establish a formal records management program for the Federal Government. This is a part of the effort over the past several years, the distinction between records management and administrative functions, which is covered in the new series.

Establishment of this new series brings into the Federal Government. The new flysheet provides consistency in describing, classifying, and maintaining records in the Federal Government. The new flysheet

This series includes positions which involve controlling, directing, organizing, supervising, maintaining, and using. Position Classification Qualification Standard

Agencies must apply this occupational series to positions that require the following:

If you have any follow-up questions or would like to schedule a meeting, please contact Deon.Fortune-Canada@opm.gov.

- Attachment 1: [Presidential Memorandum – Managing Government Records](#)
- Attachment 2: [Managing Government Records Directive](#)
- Attachment 3: [Position Classification Flysheet for Records and Information Management Series, 0308](#)

www.opm.gov

Our Mission is to Recruit, Retain and Honor a World-Class Workforce to Serve the American People

Records and Information Management Series, 0308

March 2015

Position Classification Flysheet for Records and Information Management Series, 0308

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OPM Releases Final Records Management Occupation Flysheet

by Arian Ravanbakhsh on March 25, 2015

OPM released a memorandum for Chief Human Capital Officers announcing the final version of the Records Management Occupation Flysheet (O308) and the Qualification Standard on March 10. This action formally created a new occupational series of records and information management. We believe this will elevate the roles, responsibilities, and skill sets for agency records officers and other records and information professionals.

The task of establishing the occupational series is an important target in the [Managing Government Records Directive](#). OPM conducted multiple rounds of review, focus groups, and received numerous comments from us, the federal records management community, and other interested groups as they created this series.

OPM Deputy Associate Director, Recruitment & Hiring, Kimberly A. Holden said "Establishment of this new series brings into focus the records and information management workforce using one occupational series to provide consistency in describing, classifying, and recruiting for records and information management specialists across the Federal Government."

For specific questions regarding how this series will be applied at your agency please contact your Human Capital Office for details. General questions or feedback to NARA can be sent to: Preston Huff at preston.huff@nara.gov or Lisa Haralampus at

<http://blogs.ar>

[-express/](#) (has Memorandum on Mar Agency Chief Officers and Flysheet).



How was the flysheet cr

- OPM conducted multiple rounds of review, held focus groups
- OPM posted draft on Dec 31, 2014
- OPM received numerous comments us, the federal records management community, and other interested groups as they created this series.



What Does It Do?

- Provides direction to Chief Human Capital Officers (CHCO)
- Recognizes RIM as a profession
- Incorporates 21st Century RIM (including electronic recordkeeping)
- Fulfills M-12-18 requirement to establish records management occupation series



Scope?

- Includes positions which supervise, lead, perform RIM work – planning, controlling, directing, organizing, training, promoting, other related activities.
- Does NOT cover positions with limited responsibilities.
- Series covers positions primarily responsible for overall RIM management in an organization

VA Careers

- ▶ VA Careers
- ▶ More Health Care

QUICK LINKS

 Hospital Locator

Zip Code

 Health Programs

 Protect Your Health

 A-Z Health Topics

 **Veterans
Crisis Line**
1-800-273-8255 **PRESS 1**

 **My healthvet**
Online
My Health, My Care: 24/7 Access to VA



USAJOBS
WORKING FOR AMERICA

Keyword(s)/Serie

All Categories:

Within 100 m

City, State or Zip

Supervisory Records & Information Management Specialist-GS-0308-09

Las Vegas, NV

Duties:

PLEASE NOTE: The Records and Information Management position is in the GS-0308 series. This is a formally created new occupational series of records and information management.

More Job Detail:

Denica D. Black
Phone: (702)791-9000x15600
Email: DENICA.BLACK@VA.GOV



Contacts

- OPM - Deon Fortune-Canada at (202) 2319 or Deon.Fortune-Canada@opm.gov
- NARA - Lisa Haralampus at 301-837-1744 or lisa.haralampus@nara.gov
- NARA - Preston Huff at 817-551-2001 or preston.huff@nara.gov



Electronic Records Archives (ERA) and Annual Move Upda

Cathy Westfeldt and Lynn Stew

April 15, 2015



Ch...ch...ch...changes...

- Mike Carlson retired in January
 - ERA User Adoption Lead
- Cathy Westfeldt assumed some of his f responsibilities
 - Reduced facilitator role
- Within Office of the Chief Records Of



ERA Resources

- Agency User Manual
- User Account Guide
- ERA FAQs
 - Revised April 2015
- Online training and more
- <http://www.archives.gov/records-mgm>

ERA Help Desk

- ERAHelp@nara.gov
- 877-372-9594





Tips and Reminders for ERA User Account Manag

- Check the Agency field on ERA account request form before approving the re
- Respond to the Quarterly Reauthoriz Requests from the ERA Help Desk



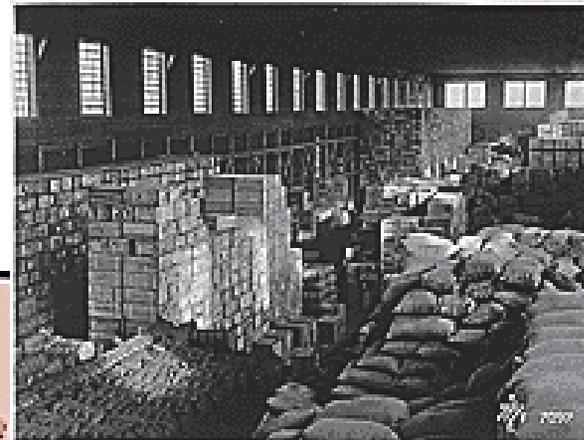
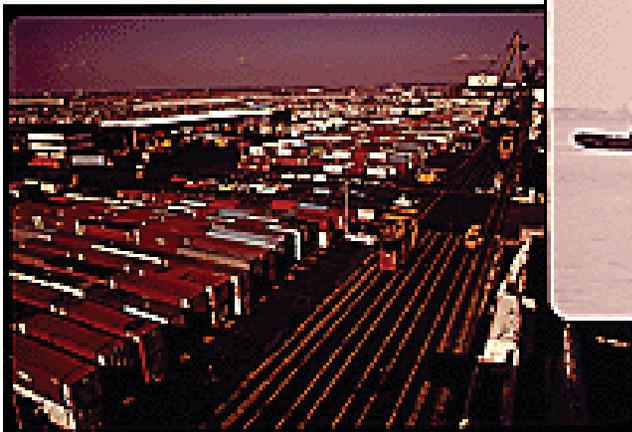
ERA User Account Manage

- Account suspension and termination
 - No log in after 90 days = suspended
 - Contact ERA Help Desk for password reset
 - No log in after 365 days = terminated
 - Submit new online account request form
- Notify NARA when your ERA Account Manager changes
 - Email ERAaccounts@nara.gov



Annual Move: Disposition Year Cycle

2015 and 2016
Annual Moves





2015 Annual Move

- Transfer Requests (TRs) loaded into October 1, 2014
 - 10,633 TRs (117,117.4 cf.) loaded
 - 20,000 cf. already in NARA physical cus
 - Most TRs are still in Draft for agency r
 - Still plenty of time to propose them!



2015 Upcoming Dates

- TRs proposed by June 1 eligible for “transfer
- 2015 TRs may be proposed until end of 2015

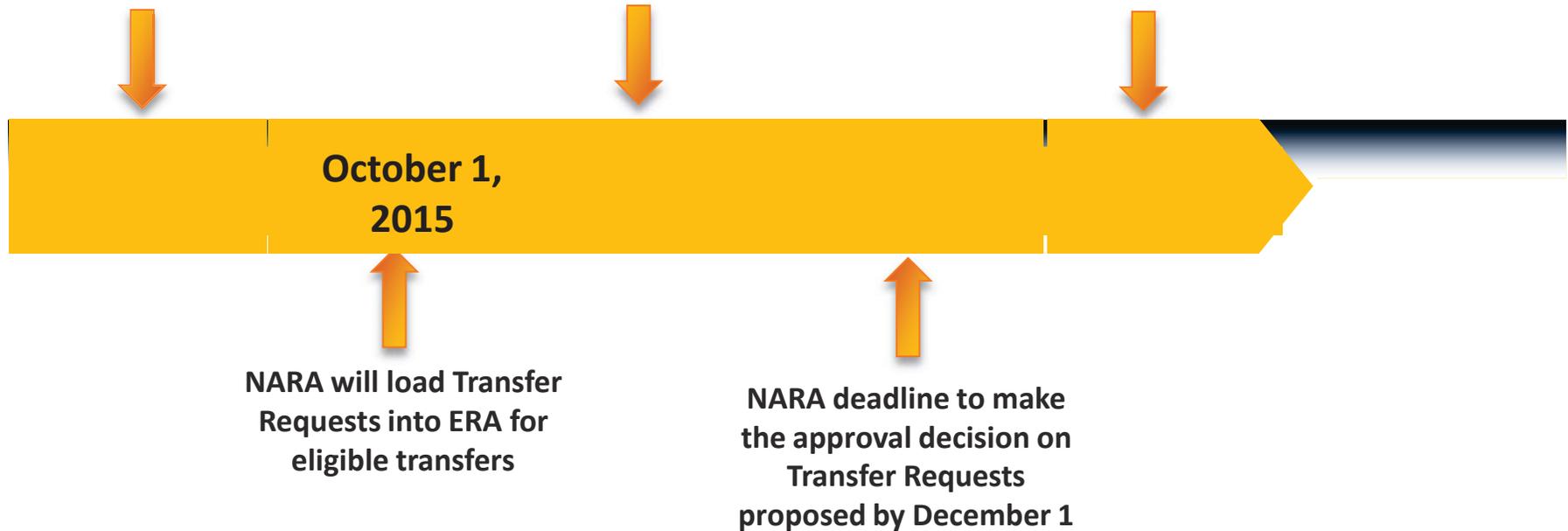


2016 Annual Move

Agencies will receive lists of potentially eligible FRC transfers for January 2016 for their agency

Agency deadline for proposing Transfer Requests to NARA for movement in the January-March quarter

Deadline for ph transfer of all re with NARA approval transfer requests





Declassification Review Checklis

- For classified records, attach a complete Classified Records Transfer Checklist (NA f 14130) prior to submission to NARA
- For more information: <http://www.archives.gov/declassification/ndc/forms/na-14130.pdf>



Reviewing July Spreadsheets: Key Considerations

- Validate information on the spreadsheet
- Review Disposition Authorities
- Review information on restrictions
- Are records needed for current business (e litigation discovery or FOIA requests)



Spreadsheet Feedback

- Send any changes or questions to:
 - annual.move@nara.gov
- If you have updates, submit them in spreadsheet format by August 5
- Updates received after August 5 will not be reflected in TRs loaded by NARA into



Contact Us

- Annual Move Questions
 - annual.move@nara.gov
- ERA Help Desk
 - 877-372-9594 or ERAHelp@nara.gov
- Your NARA appraisal or accessioning ar
- Cathy Westfeldt (California)
 - cathy.westfeldt@nara.gov or 949-448-4932

Archives and Records Centers Information System (ARCIS)

An Announcement

BRIDG

April 15, 2015



ARCIS History

- FRCP needed to replace antiquated mainframe system known as NARS 5.
- ARCIS design started in FY2006 and was deployed in FY2009.
- Original customer portal version had, and still has, reference requests only with record group as the only access control.



ARCIS History

- FRCP identified immediate need to develop a better customer portal.
- New portal was developed in FY2010.
 - Several agencies influenced the new design.
 - Four (4) interdependent components.
- Fifty-two (52) agencies deployed to date.
 - Department of Justice was the first to deploy in September 2011 .



Interdependent ARCIS Components

- **User Administration:** Set up ARCIS users assign them capabilities.
- **Access Control:** Restrict what records each can access.
- **Records Transfers:** Submit SF 135s online and track the status of records transfers.
- **Reference Requests:** Submit OF 11s online and track the status of reference requests.



Access Controls

- Record Group
- Records Center
- Charge Code / Account
- Security Classification and Level
- Agency Defined Fields (optional)



The Announcement

- Effective October 1, 2016 (FY17), all new records transfers and reference requests should be submitted via the ARCIS customer portal.
- FRCP will likely have different service fees for portal born versus non-portal transactions.
 - Requests
 - Records Transfers



Time to Deploy...is NOW

- First of all, the benefits to you:
 - YOU control who can conduct business with the FRCs and to what records users have access.
 - YOU get better tracking and accounting of your holdings.
 - Your staff can submit transactions faster and with a higher data entry accuracy rate.
 - It's easy to learn and it's much better than the original portal.



Time to Deploy...is NOW

- Only 370 business days to 10/01/2016!
- Deploy minimally or as robustly as you wish.
- New deployment methodology.
- Training via the ARCIS website.
 - Dept. of Labor successfully deployed this way.
- Access control feature is now mandatory!
- You need to get in touch with me!



Thank you!

For more information, please contact:

John McEvoy

240-338-3616 (cell)

john.mcevoy@nara.gov





BRIDG FY 2015 Meeting Da

* Go to <http://www.archives.gov/records-mgmt/meetings/#dates> for BRIDG meeting lis