

Just-in-Time Instructions for: Submit for Certification

The Preview & Submit tab (from the main navigation menu) aggregates all the information you provided for your schedule across multiple tabs and displays them on one page. You can use this overview to review/check your entries and make edits as appropriate. *You can also submit the records schedule for certification from this tab.*

1. Review the information displayed on Preview & Submit tab. You will notice that each tab from the main navigation menu is represented.
2. Select the **minus (-) symbol** to collapse any section.
3. Select the **plus (+) symbol** to expand any section.
4. Select **Edit** located to the right of any section header to access and edit information on the corresponding tab.
 - a. Enter your **edits**.
 - b. Select **Save Changes**. The Preview & Submit tab displays.
5. Select **Download All** to the right of the *Attachments* header. *Optional if you'd like to download the attachments.* The *Generate Package for Download* dialog window displays.
 - a. Select **Confirm** to confirm the download or **Cancel** to cancel the action. A confirmation message displays advising that you will be notified (i.e., through the ERA 2.0 **Notifications** function available on your *Homepage* task bar) when the processing is complete. Alternatively, you may check the status through the **Task Progress** function, also available on your *Homepage* task bar.
 - b. Confirm the **download is complete prior to**

submitting the records schedule for certification, to avoid triggering an error on your submission.

6. Select **Submit for Certification** to submit the records schedule to the Certifying Official.
7. Verify that the following confirmation displays: **The records schedule has been successfully submitted for certification.**

ERA 2.0

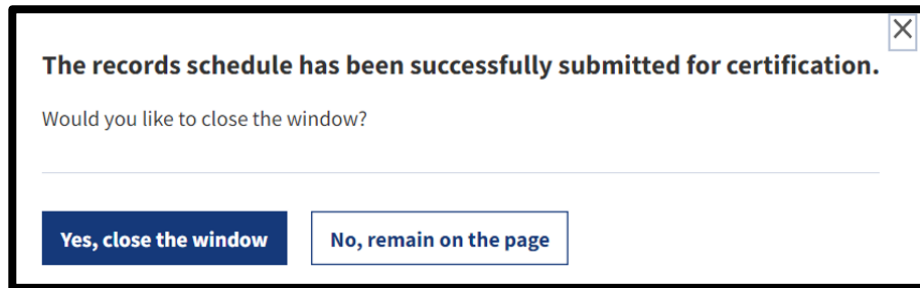



Figure 1: Submission Confirmation Message

8. Select **Yes, close the window** to close out of the records schedule and go to your *Dashboard*, or select **No, remain on page** to go to the Records Schedule Summary tab. This tab replaces the Preview & Submit page after the records schedule is submitted for certification. You can track the status of actions taken on the records schedule by reviewing the History & Activity Log. Go to Step 9 for instructions for reviewing the History & Activity Log.

 After submitting the records schedule for certification, the form is routed to the Certifying Official(s). The Certifying Official(s) will review the form and edit it as appropriate. The Certifying Official(s) will then take actions to either certify the form or return it for revision. For additional information, please review the support materials for the **Certify a Records Schedule** task available on the ERA 2.0 Training page.

END.