**SIN 518210ERM Vendor Certification for Electronic Records Management Solutions**

Version 3.0 (As of MAS Refresh 18)

For the purposes of the MAS Solicitation, eight (8) specific elements of Electronic Records Management (ERM) Services have been identified. These 8 elements are fully defined and the corresponding requirements are identified in NARA’s *Universal Electronic Records Management Requirements* spreadsheet attachment to the Solicitation. These requirements have been established and are administered by the National Archives and Records Administration (NARA). Vendors may provide any combination of the 8 elements of ERM solutions; however, vendors must certify that they are capable of meeting all standards associated with the elements they propose by completing this self-certification. *Vendors must include a completed copy of this certification in their published GSA MAS Contract Price List to help illustrate their ERM capabilities to federal customer agencies.*

**Proposed Elements of Electronic Records Management Services:**

By selecting the below Elements, you are self-certifying you meet NARA’s Universal ERM Requirements for that Element. Select all Elements that apply.

☐ Element 1 - Office Management Applications

☐ Element 2 - Electronic Messages

☐ Element 3 - Social Media

☐ Element 4 - Websites

☐ Element 5 - Photographs (Born-Digital and Scanned Images)

☐ Element 6 - Digital Audio and Video

☐ Element 7 - Structured Data

☐ Element 8 - Shared Drives

**In the space below you must provide a brief summary description for each of the above Elements that you have checked off.** The summary must include which ERM products/ services/ solutions — currently awarded under SIN 518210ERM of your MAS contract — are related to the respective Element. Example questions are provided for each Element to assist with your response. Those questions are based on NARA’s Universal Electronic Records Management Requirements and reflect common questions from agencies. *If you cannot provide a summary description for a given Element, or you do not currently offer products/services/solutions under SIN 518210ERM related to that Element, you cannot self-certify that Element on this form.* Please use as much space as you need below, but be concise! Please respond as “Not applicable” for any Element you did not select above.

The specifics of your below responses are not part of the evaluation criteria for adding SIN 518210ERM. The intention of the below section is to assist agencies with market research and help agencies understand your offerings / capabilities as they relate to the above ERM Elements you have selected.

If you have questions about the above ERM Elements and the information on NARA’s Universal ERM Requirements spreadsheet, please contact NARA’s Records Management Policy Team at rmpolicy@nara.gov.

**Element 1 - Office Management Applications**

*Please provide a brief* s*ummary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 1. Some example questions to consider are: Which office management applications does your service/solution manage (e.g. Microsoft 365, Google Workspace, etc.)? How do you associate Office Management documents with a records schedule? How do you apply metadata to Office Management documents?*

*[Response for Element 1 here — use as much space as you need. If you did not self-certify this Element in the above section, please put “Not Applicable.”]*

**Element 2 - Electronic Messages**

*Please provide a brief* s*ummary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 2. Some example questions to consider are: Which electronic messages does your service/solution manage (e.g. SMS/MMS, iMessage, WhatsApp, social media messages, voicemail, etc.)? Are you able to capture SMS/MMS at the carrier-level? How do you apply metadata to electronic messages? Where are records stored (e.g. managed in the system in which they were created or in a dedicated recordkeeping system)?*

*[Response for Element 2 here — use as much space as you need. If you did not self-certify this Element in the above section, please put “Not Applicable.”]*

**Element 3 - Social Media**

*Please provide a brief* s*ummary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 3. Some example questions to consider are: Which social media platforms does your solution/services capture and manage (e.g. Facebook, YouTube, Instagram, WordPress)? What technology is used to capture social media records? What frequency can your solution/services capture? How do you address changes in what social media platforms allow for capture?*

*[Response for Element 3 here — use as much space as you need. If you did not self-certify this Element in the above section, please put “Not Applicable.”]*

**Questions for Element 4 - Websites**

*Please provide a brief* s*ummary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 4. Some example questions to consider are: What technology do you use to crawl websites? Do you have the capability to capture internal and external sites? What formats do you use for web captures? Can you capture websites in NARA-acceptable formats? What quality assurance processes/tools do you offer?*

*[Response for Element 4 here — use as much space as you need. If you did not self-certify this Element in the above section, please put “Not Applicable.”*

**Questions for Element 5 - Photographs (Born-Digital and Scanned Images)**

*Please provide a brief* s*ummary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 5. Some example questions to consider are: How do you associate Photographs with a records schedule? How do you apply metadata for categorization and searchability to Photographs?*

*[Response for Element 5 here — use as much space as you need. If you did not self-certify this Element in the above section, please put “Not Applicable.”]*

**Questions for Element 6 - Digital Audio and Video**

*Please provide a brief* s*ummary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 6. Some example questions to consider are: How do you associate Digital Audio and Video files with a records schedule? How do you apply metadata for categorization and searchability to Digital Audio and Video?*

*[Response for Element 6 here — use as much space as you need. If you did not self-certify this Element in the above section, please put “Not Applicable.”]*

**Questions for Element 7 - Structured Data**

*Please provide a brief* s*ummary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 7. Some example questions to consider are: What is your approach to managing structured data? Do you offer solutions additional to what the agency uses, work with their current systems, or both?*

*[Response for Element 7 here — use as much space as you need. If you did not self-certify this Element in the above section, please put “Not Applicable.”]*

**Questions for Element 8 - Shared Drives**

*Please provide a brief* s*ummary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 8. Some example questions to consider are: What capabilities does your solution/services provide for identifying duplicates? What other organizational methods do you employ for managing shared drives?*

*[Response for Element 8 here — use as much space as you need. If you did not self-certify this Element in the above section, please put “Not Applicable.”]*

[Offeror Name] hereby certifies that we are capable of meeting all standards described in the solicitation and NARA’s Universal Electronic Records Management Requirements attachment for each of the sections of ERM Elements we have proposed, as indicated above.

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Offeror

*(To be signed only by an* ***authorized principal****, with authority to bind the undersigned contractor)*

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Name (Printed)

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Title

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Date

Change log for Version 3.0

1. The following ERM Elements were removed or updated in order to remain at parity with the Elements listed in NARA’s Universal Electronic Records Management Requirements spreadsheet (Version 3)
   * Removed Cloud Services
   * Removed Engineering Drawings
   * Changed Digital Media (Photo) to Photographs
   * Combined Digital Audio and Video
2. The following ERM Elements names have been updated to remove the reference to their former name used in Version 1 of this document:
   * Element 1 - Office Management Applications: removed “(formerly ‘Desktop Applications’)” from the Element name
   * Element 7 - Structured Data: removed “(formerly ‘Databases’)” from the Element name
3. Added requirement for contractors to provide a brief summary of awarded offerings for each ERM Element that they self-certify. Added instructional language along with example questions for each Element to assist contractors with their responses.