

**REQUEST FOR RECORDS DISPOSITION AUTHORITY**  
(See Instructions on reverse)

LEAVE BLANK	
JOB NO  <b>NC1 137 78 2</b>	
DATE RECEIVED  <b>8 MAY 1978</b>	
NOTIFICATION TO AGENCY  In accordance with the provisions of 44 U.S.C. 3303a the disposal request, including amendments, is approved except for items that may be stamped "disposal not approved" or "withdrawn" in column 10.	
<i>6-19-78</i> Date	<i>James S. Schork</i> Archivist of the United States

TO: **GENERAL SERVICES ADMINISTRATION,  
NATIONAL ARCHIVES AND RECORDS SERVICE, WASHINGTON, DC 20408**

1. FROM (AGENCY OR ESTABLISHMENT)  
General Services Administration

2. MAJOR SUBDIVISION  
Federal Supply Service

3. MINOR SUBDIVISION  
Customer Service and Support Program

4. NAME OF PERSON WITH WHOM TO CONFER  Ray Hershberger	5. TEL. EXT.  566-0673
--	------------------------------

6. CERTIFICATE OF AGENCY REPRESENTATIVE:

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposal of the agency's records; that the records proposed for disposal in this Request of 13 page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified.

**A** Request for immediate disposal.

**B** Request for disposal after a specified period of time or request for permanent retention.

C. DATE <i>May 4, 1978</i>	D. SIGNATURE OF AGENCY REPRESENTATIVE <i>Michael G. Barbour</i> Michael G. Barbour	E. TITLE Chief, Records Management Branch
-------------------------------	--	--

7. ITEM NO.	8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)	9. SAMPLE OR JOB NO.	10. ACTION TAKEN
	Complete change to files description and dispositions contained in the enclosed chapter 66, to the HB, GSA Records Maintenance and Disposition System (OAD P 1820.2).	NN-171-104	

115-107 *Copies to agency, NAF, all PRG & NEW  
6/21/78 pla*

This appendix provides general descriptions of and maintenance and disposition instructions for customer service and support program files. The customer service and support program is concerned with the development and implementation of ~~policies and~~ procedures for the provisions of advice and assistance in promotion of an efficient and responsive Government-wide procurement and supply system for personal property and nonpersonal services. Files relating to customer service and support policies, procedures, guides, and the like are not covered in this appendix. Generally, policies and procedures, to be such, must be officially and widely disseminated through published instructions. When retained by the originating office, all documents that provide the basis for, result in the preparation of, or that otherwise directly or indirectly relate to, a published instruction are identified and filed as supporting or background records thereto. Such files, when retained by the originating office, are covered in ch. 9, par. 9C2, Instructions files. Customer service and support program files are created as a result of responsibilities set forth in the GSA Organization Manual (OFA P 5440.1) and pursuant to the provisions of orders and handbooks in the 2900 subject classification series.

RH  
6-9-78

66A1. General subject files. Documents pertaining to the customer service and support program matters in general and which cannot be filed with specific files described elsewhere in this chapter or in ch. 9.

Cut off annually, hold 3 years, and destroy.

66A2 - 66A4. Reserved.

66A5. Agreement files. Documents relating to the development, negotiation, and evaluation of agreements for customer service and support. Included are coordinating actions, copies of the agreements, and related records.

*(when superseded or cancelled)*

Cut off ~~annually~~, hold 3 years, and retire.  
Destroy after 4 additional years.

*RH 6-9-78  
MS, RCD*

Note.--Documents related to agreements incorporated in published directives should be withdrawn and included in the directives case file 11B25 or the Instructions file, par. 9C2, whichever is appropriate.

*Customer*

*(for easy reference)*

*RH 6-9-78  
MS, RCD*

66A6. Master agency files. Documents relating to agency mission statements; organizational structure; biographical sketches on principal officials concerned with procurement and supply; number of storage facilities and locations; storage by square footage; principal commodities and services procured; man-years of personnel devoted to procurement, inventory management, storage, and distribution; ~~agency telephone directory~~; and copies of notations for the record on agency visits.

Cut off when superseded, canceled, or obsolete, hold 2 years, and destroy.

*RH 6-9-78  
MS, RCD*

66A7 - 66A9. Reserved.

66A10. Agency files. Documents accumulated in examining and analyzing the procedures for ~~assisting in the development of policies for~~ providing technical assistance to, and maintaining liaison and coordination with: (a) Civilian agencies (including documents accumulated as a result of involvement with the AID programs) and (b) military activities on supply matters.

Cut off annually, hold 3 years, and destroy.

66A11. Commodity and services files. Documents accumulated in examining, analyzing, and monitoring items and services in the supply system that are not related to any one agency. Included are requirements and status reports.

Cut off annually, hold 3 years, and destroy.

OAD P 1820.2 CHGE

66A12 - 66A14. Reserved.

66A15. Study files. Documents accumulated in coordinating, conducting, and participating in studies pertaining to all aspects of the customer service and support program. Included are coordinating actions, study reports, and related records.

Cut off annually upon completion of study, hold 3 years, and destroy.

Note.--Files pertaining to studies which provide the basis for or result in the preparation of a directive or other instruction should be withdrawn and included in the Directives case file 11B25 or filed in the Instructions file, par. 9C2, whichever is applicable.

66A16 - 66A19. Reserved.

66A20. Supply training materials. Documents created in preparing, coordinating, and issuing customer awareness training and briefing materials on the customer service and support program. Included are coordinating actions; record copies of course outlines, texts, and handouts; audiovisual and other training and briefing aids; and related records.

Cut off annually following supersession of the materials or discontinuance of the course, hold 3 years, and destroy.

This appendix provides descriptions of and maintenance and disposition instructions for Customer Service Representatives (CSR) Program files. The CSR program is concerned with providing policy direction to CSR's worldwide. The CSR Program files are created as a result of responsibilities set forth in the GSA Organization Manual (OFA P 5440.1).

66B1. General CSR program files. Documents accumulated in providing general policy direction to the CSR's worldwide and which cannot be filed with specific files described elsewhere in this chapter or in ch. 9.

Cut off annually, hold 3 years, and destroy.

66B2 - 66B4. Reserved.

66B5. CSR overseas and domestic program files. Documents accumulated in monitoring, supervising, and coordinating overseas and domestic CSR activities. Included are correspondence relating to customer support problems and actions taken to effect resolutions; correspondence relating to new innovations and changes in inventory management concepts; requests for administrative assistance; and related records.

Cut off annually, hold 3 years, and destroy.

66B6 - 66B9. Reserved.

66B10. CSR training material. Documents created in preparing, coordinating, and issuing training and briefing materials used by the CSR's in conducting seminars. Included are coordinating actions, record copies of course outlines, texts, handouts, and related records.

Cut off annually when course is superseded or obsolete, hold 3 years, and destroy.

This appendix provides descriptions of and maintenance and disposition instructions for documents accumulated in the development, publishing, distributing, and updating of the GSA Supply Catalog and other publications. These files are created as a result of responsibilities set forth in the GSA Organization Manual (OFA P 5440.1).

66C1. GSA catalog files. Documents accumulated in preparation of all publications relating to the GSA Supply Catalog and other publications. Included are forms; notations for the record; backup material for adding or changing item descriptions, indexes, and informational pages; manuscripts; proofs; and related records.

Catalog record copy: ~~Permanent~~. Cut off annually, hold 2 years, and retire. ~~after~~  
~~to NARS after 10 years~~. Destroy after 8 additional years. *Ret 6-9-78 MJS RCD*

Other records: Destroy on preparation of the next succeeding edition of the catalog.

66C2 - 66C5. Reserved.



This appendix provides descriptions of and maintenance and disposition instructions for Marketing Programs files. The Marketing Program is concerned with the planning, developing, and promoting of a customer-oriented program to advance awareness of commodities and services available to agencies of the Federal Government and to other qualified users. Marketing Program files are created as a result of responsibilities set forth in the GSA Organization Manual (OFA P 5440.1).

66D1. General Marketing Program files. Documents pertaining to the Marketing Program in general which cannot be filed with specific files described elsewhere in this chapter or ch. 9. Included are marketing plans, accomplishments, and related records.

Cut off annually, hold 3 years, and destroy.

66D2 - 66D4. Reserved.

66D5. Marketing Program project files. Documents accumulated in planning, developing, and promoting customer-oriented programs to promote awareness of FSS supply programs and services, such as: (1) Reviewing and preparing publications; (2) developing and maintaining informational packages; (3) identifying items and services which warrant special marketing consideration; (4) publicizing cross-servicing, supply management agreements, and operational changes; (5) developing and conducting educational programs for FSS employees; (6) guiding and directing the design and issuance of audio-visual presentations, exhibits, and similar material; and (7) developing proposed news releases. The following documents are included: Correspondence, notations for the record, official reviews, copies of requisitions, reports, resulting publications or illustrations, and other related official documents. (Necessary working records such as project officers' notes, preliminary art work, roughs, comprehensives, typestyle, photographs, related illustrations, other publications, and other backup research material will not be included until project completion.)

Cut off upon completion of the project, hold 2 years, and destroy.

66D6 - 66D9. Reserved.

66D10. Newsletters. Documents accumulated in compiling, editing, and generating items for regional newsletters. Included are submissions from GSA offices, drafts, finished official copy, one printed copy, and related records.

Cut off annually, hold 3 years, and destroy.

66D11 - 66D14. Reserved.

66D15. Marketips. Documents accumulated in the development of information for dissemination to FSS customers through MARKETIPS. Included are submissions from GSA offices, drafts, finished official copy, one printed copy, and related records.

Cut off annually, hold 3 years, and destroy.

This appendix provides descriptions of and maintenance and disposition instructions for Market Research Program files. The Market Research Program is concerned with commercial market supply or procurement research techniques and agencies' supply or procurement practices. Market Research Program files are created as a result of responsibilities set forth in the GSA Organization Manual (OFA P 5440.1).

66E1. General subject files. Documents pertaining to the Market Research program in general which cannot be filed with specific files described elsewhere in this chapter or ch. 9. Included are market research plans, accomplishments, and related records.

Cut off annually, hold 3 years, and retire.  
Destroy after 4 additional years.

66E2 - 66E4. Reserved.

66E5. Market research study files. Documents accumulated in coordinating, conducting, and participating in supply management studies and surveys; studies of commercial market supply or procurement research techniques; and analyzing agency waiver requests. Included are coordinating actions, analyses of agency reports, study reports, and related records.

Cut off upon completion of the study, hold 3 years, and retire. Destroy after 4 additional years.

Other papers: Cut off annually, hold 3 years, and destroy.