

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

*4 Nov 81 NY*

**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

Office of Supply

4. NAME OF PERSON WITH WHOM TO CONFER

Raymond Hershberger

5. TEL. EXT.

566-0673

LEAVE BLANK	
JOB NO  <u>NC1-137-82-1</u>	
DATE RECEIVED  <u>November 5, 1981</u>	
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disposal request, including amendments, is approved except for items that may be stamped "disposal not approved" or "withdrawn" in column 10	
<u>Feb 8, 82</u> <small>Date</small>	<u>[Signature]</u> <small>Archivist of the United States</small>

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 32 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 <u>10/23/81</u>	D. SIGNATURE OF AGENCY REPRESENTATIVE <u>[Signature]</u>	E. TITLE <u>Management Analyst</u>
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7. ITEM NO.	8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)	9. SAMPLE OR JOB NO.	10. ACTION TAKEN
	<u>Supply Program Records</u>  Files descriptions and disposition schedules are contained in the proposed changes to the HB, GSA Records Maintenance and Disposition System, Ch. 63 (OAD P 1820.2).	<u>NN-171-152</u>	

*103 items*

*ADCS will be forwarded with printed change.*

*Closed Out: 2-12-82: K.T.D.*

*Copy to Agency*

This appendix provides descriptions of and maintenance and disposition instructions for general supply program records. These consist of records that: (1) Relate to supply matters in general, (2) are not described in other appendixes to this chapter, or (3) document functions generally common to and performed by several supply elements. Records relating to supply policies, procedures, guides, and standards are an exception to the above and are not covered in this appendix. Generally, policies, procedures, guides, and standards, 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 relate to, a published instruction are identified and filed as supporting or background records thereto. These records are covered in ch. 9, par. 9C2, Instructions, since they are accumulated by almost all offices. Supply program records are created as a result of responsibilities set forth in the GSA Organization Manual (OHR P 5440.1) and pursuant to the provisions of orders and handbooks in the 2901 subject classification series.

63A1. Agency assistance files. Documents accumulated in analyzing and providing technical assistance to or maintaining liaison and coordination with other Federal agencies on supply matters.

Cut off in 2-year blocks, hold 2 years, and retire to FRC.  
Destroy when 5 years old.

63A2. Supply general files. These files consist of:

a. Centrally filed documents which, for the most part, duplicate material included in the decentralized files. This subpar. is applicable only in the Central Office.

b. Documents which relate to supply matters in general and which are not described elsewhere in this chapter.

(1) Central files: Cut off annually, hold 3 years, and retire to FRC. Destroy when 8 years old.

(2) All other files regardless of the level of accumulation: Cut off annually, destroy when 2 years old.

63A3 - 63A4. Reserved.

63A5. Withdrawn by CHGE.

63A6 - 63A9. Reserved.

63A10. Supply ADP project files. Documents created in developing, coordinating, and assisting in projects for the application of automated data processing (ADP) to supply operations. Included are requests, studies, evaluations, comments, and related records.

Cut off annually following completion of action on the project, destroy when 2 years old.

Note.—Files relating to ADP projects that result in the preparation of a directive should be withdrawn and included in par. 9C2, Instructions.

63A11 - 63A14. Reserved.

63A15. Supply agreement files. Documents created in negotiating reimbursable, support, or other agreements pertinent to supply with Federal agencies. Included are coordinating actions, copies of the agreements, and related records.

a. Central Office files documenting national agreements:  
Cut off annually following expiration or termination of the agreement, hold 2 years, and retire to FRC. Destroy when 5 years old.

*Amended by  
R. P. ...  
Tel...  
5 Jan 82*

Use broken line for drawing change lines.

- b. Files relating to other agreements in all offices: Cut off annually following expiration or termination of the agreement, destroy when 2 years old.

Note.—Files relating to agreements that are incorporated in directives should be withdrawn and included in par. 9C2, Instructions.

63A16 - 63A19. Reserved.

63A20. Supply facility files. Documents accumulated in planning, proposing, justifying, approving or disapproving, monitoring, and staff supervising the establishment, acquisition, expansion, alteration, modification, relocation, utilization, or discontinuance of supply storage facilities. Included are plans, proposals, justifications, cost estimates, coordinating actions, and related records.

- a. Central Office: Cut off annually following disapproval of establishment or following discontinuance, hold 2 years, and retire to FRC. Destroy when 5 years old.
- b. Other offices: Cut off annually following disapproval of establishment or following discontinuance, destroy when 2 years old.

63A21 - 63A24. Reserved.

63A25. Work standard and program planning files. Documents accumulated in the development and dissemination of work measurement standards for clerical and industrial-type operations, time studies and work sample data, statistical data, analyses, and related papers. Documents created in the preparation, submission, review, and approval of action plans that project workload, output, personnel, and other requirements for supply facilities, stores, export packing facilities, and other supply activities. Included are supply program planning analyses, plans for programs not subject to these analyses, coordinating actions, approvals, and related records.

Cut off annually, destroy when 2 years old.

63A26 - 63A29. Reserved.

63A30. Supply studies files. Documents relating to studies, analyses, or comparable efforts directed toward initiating changes and improvements in planning, directing, controlling, or doing work that will increase efficiency and effectiveness, but not studies related to specific projects, cases, or transactions referred to elsewhere in this chapter. Included are studies (including industrial engineering studies), coordination actions, statistical data, and related records.

- a. Office responsible for the study: Cut off annually following completion, hold 2 years, and retire to FRC. Destroy when 5 years old.

- b. Other offices: Cut off annually, destroy when 2 years old.

Note.—Documents related to studies that provide the basis for or that result in the preparation of a directive or comparable instructions should be withdrawn and included in par. 9C2. *or 11B25.*

63A31 - 63A34. Reserved.

63A35. Work standard development files. Documents accumulated in the development and dissemination of work measurement standards for clerical and supply facility operations. Included are time studies and work sample data, statistical data, analyses, and related records.

Destroy the work standard when superseded or obsolete.

63A36 - 63A39. Reserved.

63A40. Staff visit files. Documents created as a result of staff visits or inspections made to evaluate supply programs and operations, but not staff visits made in connection with specific projects, problems, or actions that are described elsewhere in this chapter.

- a. Central Office: Withdraw and place in inactive file on completion of the next comparable visit or after 3 years, whichever occurs first. Cut off the inactive file annually, hold 2 years, and retire to FRC. Destroy when 5 years old.
- b. Other offices: Destroy on completion of the next comparable visit or after 3 years, whichever occurs first.

63A41 - 63A44. Reserved.

63A45. Supply management reports. Documents created in reporting (normally in the form of computer-prepared listings) sales, receipts, work-in-process, and other data required for supply management purposes. Included are supply management, supply summary, and direct delivery store and nonstore reports; similar reports; and related records; including correction actions.

Cut off annually, destroy when 2 years old.

63A46 - 63A49. Reserved.

63A50. Supply training materials. Documents created in preparing, coordinating, and issuing training materials on self-service store, materials handling equipment (MHE), storage, distribution, export, packaging and packing, and other supply operations, systems, and techniques. Included are coordinating actions;

record copies of course outlines, texts, tests, and handouts; audiovisual and other training aids; and related records.

- a. Office in the Central Office responsible for preparation and issue: Cut off annually, when superseded or obsolete, hold 2 years, and retire to FRC. Destroy when 5 years old.
- b. Other offices: Coordinating actions and similar records, cut off annually, destroy when 2 years old.
- c. Published materials: Destroy when superseded or obsolete.

63A51 - 63A54. Reserved.

63A55. Supply training files. Documents relating to the provision and conduct of training in self-service store, MHE, storage, distribution, export, packaging and packing, and other supply operations, systems, and techniques. Included are training requests, training notifications, reports on training, and related records.

Cut off annually, destroy when 2 years old.

63A56 - 63A59. Reserved.

63A60. Demurrage charge verification files. Documents accumulated in verifying carrier charges for demurrage and in forwarding the bill for payment.

Cut off annually, hold 1 year, and retire to FRC. Destroy when 4 years old.

This appendix together with appropriate paragraphs in appendix 63-A provides descriptions of and maintenance and disposition instructions for records accumulated in determining the need for establishing, directing, and discontinuing individual self-service stores, and in planning, directing, evaluating, or otherwise staff supervising the self-service store program. These records are created as a result of the responsibilities set forth in the GSA Organization Manual (OHR P 5440.1) and pursuant to the provisions of orders and handbooks in the 2901 subject classification series.

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63B1. Store general files. Documents relating generally to self-service store items, services, or operations that are not identifiable with a specific agency or entity and that are not described elsewhere in this chapter.

Cut off annually, destroy when 2 years old.

63B2 - 63B4. Reserved.

63B5. Agency files. Documents accumulated in coordinating and maintaining liaison with agencies at both the national and regional level on the self-service store program, but not specific files described elsewhere in this chapter.

Cut off annually, hold 2 years, and retire to FRC. Destroy when 5 years old.

63B6 - 63B9. Reserved.

63B10. Project and study files. Documents accumulated in proposing, authorizing, conducting, coordinating, and reporting on projects or studies to improve operations or solve specific operating problems, exclusive of files described elsewhere in this chapter. Included are proposals; approvals; project, study, and visit reports; recommendations; and related records.

- a. Central Office: Cut off annually following completion of the project or study, hold 2 years, and retire to FRC. Destroy when 5 years old.
- b. Other offices: Cut off annually following completion of the project or study, destroy when 2 years old.

Note.—When a project or study results in or provides the basis for preparation of a directive, the file should be withdrawn and included in par. 11B25, Directives case files, or in par. 9C2, Instructions, whichever is appropriate.

63B11 - 63B14. Reserved.

63B15. Store establishment files. Documents created in studying the need for; coordinating space for; proposing and approving or disapproving the establishment of; arranging for the operations of; and determining the need for the expansion, relocation, and discontinuance of selfservice stores in existing or proposed buildings. Included are copies of community surveys; space requests; study requirements, notifications, and waivers; studies and survey reports;

Use broken line for quantity change lines.



proposals; approvals or disapprovals; personnel, equipment, and function transfer documents; and related records.

Place in an inactive file on disapproval of establishment or on discontinuance of a store. Cut off the inactive file annually.

- a. Central Office: Hold 2 years and retire to FRC. Destroy when 5 years old.
- b. Other offices: Destroy when 2 years old.

63B16 - 63B19. Reserved.

63B20. Store layout files. Drawings, photographs, and related documents created in developing store layouts to advantageously display merchandise, facilitate merchandise selection, and ensure maximum space utilization.

Destroy when superseded or obsolete.

63B21 - 63B24. Reserved.

63B25. Store visit files. Documents accumulated in planning, scheduling, conducting, reporting on, and following up on recommendations made as a result of staff visits to self-service stores. Included are schedules, visit notification and arrangement documents, visit reports, followup actions, and related records.

Cut off annually, destroy when 2 years old.

63B26 - 63B29. Reserved.

63B30. Withdrawn by CHGE

63B31 - 63B34. Reserved.

63B35. Shopping plate files. Documents created in reviewing eligibility of Federal and non-Federal applicants for approving or disapproving the issue of and controlling the use of self-service shopping plates. Included are applications, authorization letters, lost or stolen plate reports and lists, found plate notifications, expiration notices, and related records.

- a. Plates: Destroy when expired or revoked.
- b. Deactive when plate is superseded, revoked, or turned in, destroy when 1 year old.
- c. Disapproved applications and related records: Cut off annually, destroy when 1 year old.

d. Other records: Cut off annually, destroy when 2 years old, except that lists may be destroyed when superseded or obsolete.

63B36 - 63B39. Reserved.

63B40. Plate numerical control files. Registers or other documents used to record and control the assignment of numbers to self-service shopping plates.

Destroy control record 2 years after all plates listed thereon have expired or are revoked.

63B41 - 63B44. Reserved.

63B45. Store identification badge files. Documents accumulated in issuing and controlling the issue of identification badges to self-service store employees.

Destroy on separation or transfer of employee, or when badge is superseded or obsolete.

63B46 - 63B49. Reserved.

63B50. Store item files. Documents accumulated in requesting, coordinating, testing, and approving or disapproving new items for; coordinating and approving or disapproving the deletion of items from; and taking other actions (not referred to elsewhere in this chapter) on existing items in self-service store(s). Included are requests, testing area selection documents, evaluation studies, special orders, approvals, disapprovals, and related records.

Cut off annually following approval or disapproval to include the item in, delete it from, or otherwise change its status in a store(s) or the self-service store system, destroy when 2 years old.

63B51 - 63B54. Reserved.

63B55. Withdrawn by CHGE

63B56 - 63B59. Reserved.

63B60. Withdrawn by CHGE

63B61 - 63B64. Reserved.

Use broken line for drawing change lines.

63B65. Transaction summary files. Documents created in reporting summarized information on all stock increases, decreases, and other transactions. Included are transaction summaries, price change listings, and related records.

Cut off annually following expiration of applicable inventory period, hold 1 year, and retire to FRC. Destroy when 3 years old.

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63B66 - 63B69. Reserved.

63B70. Purchase case reviews. Documents accumulated in coordinating the scheduling of, reviewing reports of, and taking corrective action in connection with deficiencies disclosed as a result of periodic reviews of nonsupply facility purchases by stores. Included are schedules, minutes of meetings, reports of the reviews, and related records.

- a. Schedules: Cut off annually following expiration of the applicable inventory period, destroy when **3** years old.
- b. Other records: Destroy when 1 year old.

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63B71 - 63B74. Reserved.

63B75. Stock disposition files. Documents created in determining store stock to be disposed of and in providing and taking action on disposition instructions pertinent thereto. Included are copies of property transfer authorizations; reports of excess property; disposal and notations for record, recommendations, and instructions; approvals; and related records.

Cut off annually following expiration of applicable inventory period, hold 1 year, and retire to FRC. Destroy when 3 years old.

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63B76 - 63B79. Reserved.

63B80. Store inventory files. Documents accumulated in planning, scheduling, conducting, and following up on inventories to reconcile store property accounting records with the physical inventory on hand. Included are inventory schedules and notifications, inventory monitor designations, certified inventory listings, property writeoff documents, board of survey reports, and related records.

- a. Schedules and notifications: Cut off annually, destroy when 1 year old.
- b. Count cards: Destroy after reconciliation and audit of applicable inventory.
- c. Other records: Cut off annually following expiration of applicable inventory period, hold 1 year, and retire to FRC. Destroy when 3 years old.

New

*Amended  
Per GAO  
letter 8/19/02  
DPP/MS/PCO*

63B81 - 63B84. Reserved.

63B85. Out-of-balance listing files. Listings and related records reflecting manifests out of balance at each store.

Destroy after reconciliation of applicable inventory.

63B86 - 63B89. Reserved.

63B90. Demand data listings. Listings reflecting merchandise demand (issue) activity by store and used for item stocking and inventory management by store managers and store branch personnel.

Destroy on receipt of the next listing.

63B91 - 63B94. Reserved.

63B95. Self-service store item records. Documents created in the maintenance and use of the Self-Service Store Item Record (SSIR) tape file established to provide catalog data, storage information, and similar data. Descriptions of and disposition instructions for these files are as follows:

a. SSIR coding sheets and maintenance lists. Documents prepared to guide key punching of cards needed to enter data into the computer and to verify entry of the data.

Destroy on verification of entry of data.

b. Price error listing and card files. Lists, cards, and related records on items for which prices do not agree with the master catalog tape. They are used to physically inventory and adjust the inventory for the items involved.

Cut off annually following expiration of applicable inventory period, destroy when 1 year old.

c. Catalog change listings. Listings that reflect changes made by Central Office, regional offices, or store personnel in cataloging data for items.

Cut off annually following expiration of applicable inventory period, destroy when 1 year old.

Use broken line for drawing change list.

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This appendix together with appropriate paragraphs in appendix 63-A provides descriptions of and maintenance and disposition instructions for records created in the establishment, staff supervision, operation, modification, and discontinuance of supply service centers. Supply service centers are established to display GSA supplied merchandise and to provide assistance to customer agencies on supply ordering and problems. These records are created as a result of responsibilities set forth in the GSA Organization Manual (OHR P 5440.1) and pursuant to the provisions of orders and handbooks in the 2901 subject classification series.

Use broken line for drawing change lines.

63C1. Supply service center establishment files. Documents created in the establishment, modification, change, and discontinuance of supply service centers. Included are studies, proposals, coordinating actions, approvals or disapprovals, and related records.

Cut off annually following disapproval or discontinuance of establishment:

- a. Central Office: Hold 2 years, and retire to FRC. Destroy when 5 years old.
- b. Other offices: Hold 2 years, and destroy; earlier destruction of obsolete documents is authorized.

63C2 - 63C4. Reserved.

63C5. Agency assistance files. Documents accumulated by supply service centers in providing advice and assistance to and maintaining liaison with other agencies on the availability, selection, ordering, and shipment of GSA-supplied merchandise, and on supply plans and problems. Other offices may also accumulate these files but only when they are not merged with similar files established for self-service store operations. Included are tour arrangement documents; copies of requisitions; visit reports; inquiries; conference arrangement documents, minutes, and reports; and similar records.

Cut off annually, destroy when 2 years old.

63C6 - 63C9. Reserved.

63C10. Display item case files. Case files established for each item requisitioned for display. Files accumulated by centers include copies of requisitions and orders, shipment notifications, receiving reports, property writeoff authorizations, copies of discrepancy in shipment reports, and related records. Files accumulated by other offices include some of the documents referred to above and, in addition, include requests for, recommendations on, and instructions for disposition of display items, and related records.

- a. Centers: Withdraw and place in inactive file on transfer or other authorized disposition of the item, destroy when 3 years old.
- b. Other offices: Withdraw and place in inactive file when the related item is discontinued as a display item, destroy when 2 years old.

63C11 - 63C14. Reserved.

Use broken line for drawing change lines.

63C15. Display item register files. Registers used by supply service centers to record and control requisitions for display merchandise.

Destroy 3 years after register sheet is filled.

63C16 - 63C19. Reserved.

63C20. Inventory adjustment files. Documents accumulated by centers and other offices in conducting, reporting on, and reconciling physical inventories, and by centers alone in taking inventory adjustment actions. (Files relating to inventory adjustment actions accumulated by other offices are included in the 63C10, Display item case files.) Included are physical inventory reports and related records; requests for, recommendations concerning, and communications providing disposition instructions; and similar records.

- a. Centers: Cut off annually, destroy when 3 years old.
- b. Other offices: Cut off annually, hold 1 year, and retire to FRC. Destroy when 4 years old.

63C21 - 63C24. Reserved.

63C25. Display item records. Ready-reference-type records used to provide summarized catalog, acquisition, display location, quantity, disposal, and inventory adjustment data on each supply distribution facility or contractor-supplied display item received by the supply service center.

Withdraw and place in inactive file on final disposition of the item, cut off the inactive file annually, destroy when 2 years old.

63C26 - 63C29. Reserved.

63C30. Contract display item suspense cards. Cards prepared for each display item acquired by contract and suspended by contract expiration date.

Withdraw and destroy on date of expiration of contract.

63C31 - 63C34. Reserved.

63C35. Merchandise control records. Records reflecting by dollar value the opening inventory; receipts, issues, and adjustments; and closing inventory; normally on a daily basis. Included are merchandise control records with copies of advance notification of shipment and related records.

Cut off annually, destroy when 3 years old.

This appendix together with appropriate paragraphs in appendix 63-A provides descriptions of and maintenance and disposition instructions for program records created in the staff supervision and administration of programs concerned with materials handling equipment (MHE), storage equipment, design and layout of supply facilities, development and installation of new storage methods and techniques, facility fire prevention, safety, and protection. These records are created as a result of responsibilities set forth in the GSA Organization Manual (OHR P 5440.1) and pursuant to the provisions of orders and handbooks in the 2901 subject classification series.

Use broken line for drawing change lines.



63D1. Master storage plans. Documents accumulated in preparing, coordinating, reviewing, submitting, and approving plans that project requirements for, and improvements in, storage space, systems, techniques, operating equipment, aids, and similar storage resources and matters for each supply storage facility. Included are layouts; operating plans; repairs, additions, and replacement schedules; stock placement plans; changes to the aforementioned documents; and related records.

- a. Engineering and Storage Division: Place pages in inactive file, cut off the inactive file annually, hold 2 years, and retire to FRC. Destroy when 5 years old.
- b. Other offices: Place superseded pages in inactive file, cut off the inactive file annually, destroy when 2 years old.

63D2 - 63D4. Reserved.

63D5. Individual building reports. Documents created in preparing, submitting, and reviewing reports on location, shipping facilities, space, construction, protective equipment, installed equipment, and other data pertinent to individual buildings of supply storage facilities.

Destroy on preparation and receipt of the next succeeding report.

63D6 - 63D9. Reserved.

63D10. Supply storage and space utilization reports. Documents accumulated in reporting and reviewing supply storage space utilization data to ensure economical utilization and to provide a basis for establishing or revising supply facility space utilization standards.

Cut off annually, destroy when 1 year old.

63D11 - 63D14. Reserved.

63D15. Supply design and layout files. Documents created in preparing and disseminating standardized or specialized designs and layouts for supply storage facilities. Included are drawings, plats, floor plans, charts, photographs, and related records.

Destroy when superseded or obsolete.

63D16 - 63D19. Reserved.

63D20. Withdrawn by CHGE .



63D45. Operating equipment registration and inventory files. Documents created in the registration an administration of operating equipment. Included are proposals, layouts, justifications, initial stocking requests and approvals, and related records.

Cut off annually, hold 2 years and retire to FRC. Destroy when 5 years old.

63D46 - 63D49. Reserved.

63D50. Operating equipment utilization and maintenance files. Documents created with reference to maintenance of operating equipment. The periodic reporting and review of data on the operation and repair of operating equipment including cost. Included are repair shop planning and layouts, staffing, shop equipment, and related records.

Cut off annually, hold 2 years, and retire to FRC. Destroy when 5 years old.

63D51 - 63D54. Reserved.

63D55. Operating equipment service contract files. Case files accumulated in administering contracts for the commercial maintenance and repair of operating equipment.

Place in inactive file on completion of the contract or on termination of the contract. Cut off the inactive file annually, hold 1 year, and retire to FRC. Destroy when 6 years old.

63D56 - 63D59. Reserved.

63D60. Withdrawn by CHGE .

63D61 - 63D64. Reserved.

63D65. Withdrawn by CHGE .

63D66 - 63D69. Reserved.

63D70. Facility fire prevention files. Documents accumulated that relate to fire prevention, fire inspections, fire and safety promotional programs. Included are documents that relate to fire prevention matters, inspection report, letters requiring corrective actions, notices and reports of fires, safety promotion programs, such as Annual Fire Prevention Week, and related records.

- a. Cut off annually, destroy when 1 year old.
- b. Inspection reports: Withdraw and destroy on completion of the next comparable inspection.

OAD P 1820.2 CHGE

63D71. Commodity flash point files. Documents accumulated in establishing and disseminating information on the temperature at which specific flammable commodities will burst into flame. Included are technical memorandums and related records.

Destroy on supersession of the technical memorandum or on discontinuance of the commodity.

63D72. Flammable storage area files. Documents reflecting information on areas used for storage of flammable items and used primarily as input for staff visits.

Destroy when no longer needed.

63D73 - 63D74. Reserved.

63D75. Forest fire support files. Reports and related records on support provided to the U.S. Forest Service or other organizations during fire-fighting operations.

Cut off annually, destroy when 1 year old.

63D76 - 63D79. Reserved.

63D80. Facility safety files. Documents relating to facility safety with descriptions of and maintenance and disposition instructions for these files are as follows:

a. General files. Included are safety and accident prevention matters in general.

Cut off annually, destroy when 2 years old.

b. Safety equipment. Included are files accumulated in collecting, preparing, and disseminating information on safety equipment; e.g., gloves, goggles, and shoes.

Cut off annually, destroy when 2 years old.

c. Accident report files. Included are reports and related records about accidents, particularly those resulting in disabling injuries.

Cut off annually, destroy when 4 years old.

d. Facilities safety standards. Included are safety council reports, technical memorandums containing abstracts, and related records concerning safety standards of supply facility areas.

Cut off annually, destroy when 2 years old.

63D70a

63D70e

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C. Supply

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Appendix 63-D

63D81 - 63D84. Reserved.

63D85. Facility security files. Documents relating to physical protection plans, security measures, and sensitive item listings. Included are facility security and protection plans in general, preparation of plans and comments for the physical protection of the facility and the establishment and maintaining of a list of items in storage which, because of their value or utility, are subject to loss, pilferage, or misuse.

- a. Listings: Destroy when superseded.
- b. Other records: Destroy upon issuance of current documents.

63D86. Environmental protection files. Documents relating to the protection of the environment as it relates to supply operations including, but not limited to, hazardous items and energy conservation, and related records.

Cut off annually, destroy when 2 years old.

63D87 - 63D89. Reserved.

63D90. Supply facility photographs. Photographs of supply facilities.

Destroy when no longer needed for current business.

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63D85  
Sup

This appendix together with appropriate paragraphs in appendix 63-A provides descriptions of and maintenance and disposition instructions for program records accumulated in the staff supervision of the preservation, packaging, and packing function. This function is concerned with providing technical guidance in the preservation, unit packaging, packing, marking, blocking and bracing, unitizing, and containerizing of Government supplies for shipment and storage. These records are created as a result of responsibilities set forth in the GSA Organization Manual (OHR P 5440.1) and pursuant to the provisions of orders and handbooks in the 2901 subject classification series.

Use broken line for drawing change lines.

63E1. Preservation and packing general files. Documents accumulated in the preparation, review, prescribing procedures, methods, and techniques for packaging and packing supplies in general, excluded are specific files prescribed elsewhere in this chapter.

Destroy the letter when superseded, canceled, or obsolete.

63E2 - 63E4. Reserved.

63E5. Withdrawn by CHGE .

63E6 - 63E9. Reserved.

63E10. Withdrawn by CHGE .

63E11 - 63E14. Reserved.

63E15. Shipment discrepancy files. Documents relating to the receipt of damaged shipments resulting from preservation, packaging, or packing failures. Included are discrepancy in shipment reports, letters, investigation reports, pack improvement reports, and related records.

Cut off annually, destroy when 2 years old.

This appendix together with appropriate paragraphs in appendix 63-A provides descriptions of and maintenance and disposition instructions for program records created in planning, arranging, administratively directing, and advising on inventories of stock at supply facilities; testing or auditing the accuracy of order filling, stock locator records and shelf-life surveillance operations; and taking other statistical samplings of facility operations. These records are created as a result of responsibilities set forth in the GSA Organization Manual (OHR P 5440.1) and pursuant to the provisions of orders and handbooks in the 2901 and 4800 subject classification series.



63F1. Sampling designations. Documents reflecting the designation and notification of individuals as inventory surveillance staff specialists.

Destroy when superseded or obsolete.

63F2 - 63F4. Reserved.

63F5. Inventory files. Documents accumulated in planning, coordinating, conducting, reporting on, and reconciling physical, rejected lot, zero balance, replenishment exhaustion, and similar inventories, exclusive of documents referred to elsewhere in this appendix. Included are inventory checklists; sensitive item listings; work documents preparation requests; sample tabulations; copies of emergency issue and warehouse refusal documents, such as shipping orders and changes in quantity notices; counters' accuracy verification records; inventory reconciliation listings or stock adjustment documents; inventory reports, including statements of results; copies of board of survey documents; and related records.

Cut off annually, destroy when 3 years old.

63F6 - 63F9. Reserved.

63F10. Inventory count cards. Count cards retained after completion of the inventory for use in investigating inventory balances, detecting locator errors, analyzing error-producing causes, and similar purposes.

Destroy on receipt of count cards for the next succeeding inventory; earlier destruction is authorized.

63F11 - 63F14. Reserved.

63F15. Stock location sampling files. Documents accumulated in samplings conducted to determine the degree to which the location records reflect the physical location of the stock. Included are reports and related records.

Cut off annually, destroy when 1 year old.

63F16 - 63F19. Reserved.

63F20. Shelf-life surveillance testing files. Documents created in the test or audit of the labeling of inspected items and the maintenance of shelf-life surveillance files by supply facilities.

Cut off annually, destroy when 1 year old.

63F21 - 63F24. Reserved.

OAD P 1820.2 CHGE

63F25. Error analyses files. Documents accumulated as a result of identifiable analyses undertaken to detect inventory error-producing causes, and in recommending action to correct or eliminate those causes.

Cut off annually, destroy when 2 years old.

63F26 - 63F29. Reserved.

63F30. Stock sampling files. Documents reflecting statistical sampling of the accuracy of stock receipt, storage, and selection operations, and the condition of stock.

Cut off annually, destroy when 1 year old.

63F31 - 63F34. Reserved.

63F35. Excess stock inventory files. Documents accumulated in inventorying excess stock on hand at the storage facility. Included are excess property lists, copies of reports of excess, reconciliation comments, and related records.

Cut off annually, destroy when 1 year old.

63F36 - 63F39. Reserved.

63F40. Stock disposal sampling files. Documents accumulated in reviewing supply storage facilities to make sure that damaged, deteriorated, or unsuitable for issue stock is not present.

Cut off annually, destroy when 1 year old.

63F41 - 63F44. Reserved.

63F45. Catalog sampling files. Documents accumulated in samplings to determine if catalog changes have been entered in the computer file, in the stock location file, on the stock, or on bin labels.

Cut off annually, destroy when 1 year old.

63F46 - 63F49. Reserved.

63F50. Withdrawn by CHGE .

Use broken line for drawing and type

This appendix together with appropriate paragraphs in appendix 63-A provides descriptions of and maintenance and disposition instructions for general distribution systems program records. These consist of files that are used to maintain control records on systems and procedures for the overall operations of distribution systems. These records are created as a result of responsibilities set forth in the GSA Organization Manual (OHR P 5440.1) and pursuant to the provisions of orders and handbooks in the 2901 subject classification series.

Use broken line for drawing change lines.

63G1. Distribution systems general files. Documents accumulated in the preparation of communications on distribution systems operations techniques relating to specific projects and case files.

Cut off annually, destroy when 2 years old.

*NW*

63G2 - 63G4. Reserved.

63G5. Distribution systems project files. Files used to maintain a control record on projects, documents, systems procedures, and implementing correspondence to improve operations or solve specific operating problems.

Cut off annually, destroy when 2 years old.

*NW*

Use broken line for drawing change lines

This appendix together with appropriate paragraphs in appendix 63-A provides descriptions of and maintenance and disposition instructions for general shipping operations program records. These consist of files on export operations procedures and project case files. These records are created as a result of responsibilities set forth in the GSA Organization Manual (OHR P 5440.1) and pursuant to the provisions of orders and handbooks in the 2901 subject classification series.

Use broken line for drawing change lines

63H1. Shipping operations general files. Documents accumulated or created on shipping operations procedures. Excluding all documents relating to specific project case files.

Cut off annually, destroy when 2 years old.

*New*

63H2 - 63H4. Reserved.

63H5. Shipping operations project case files. Documentation accumulated pertaining to specific project case files under the shipping operations program including files regarding military services dealing with shipping procedures.

Cut off annually, destroy when 2 years old.

*New*

Use broken line for drawing charge lines.

This appendix together with appropriate paragraphs in appendix 63-A provides descriptions of and maintenance and disposition instructions for general distribution movements operations program records. These consist of files on distribution movements project files, agency support files, and agreement files. These records are created as a result of responsibilities set forth in the GSA Organization Manual (OHR P 5440.1) and pursuant to the provisions of orders and handbooks in the 2901 subject classification series.

Use broken line for drawing change line.

63I1. Distribution movements general files. Documents accumulated relating to distribution movements to and from all regions as well as congressional correspondence relating to distribution movements operations.

Cut off annually, destroy when 1 year old.

63I2 - 63I4. Reserved.

63I5. Distribution movements project files. Documents pertaining to specific programs in distribution movements. These files consist of records on carriers, strikes, dangerous or hazardous materials, Government Bills of Lading, temporary office furniture, and inside delivery. The project files include correspondence on the following programs. Shipment Consolidation and Planned Order Selection Program, Transportation Inquiry and Payment System, Consolidated Receiving Point Program, Interim System, and Management Improvement Projects.

Cut off annually, hold 2 years, and retire to FRC. Destroy when 5 years old.

63I6 - 63I9. Reserved.

63I10. Agency support program files. Documents accumulated in communicating with Federal agencies on activities or matters related to transportation and movement of materials. These files consist of correspondence with agencies; e.g., Military Traffic Management Command, Department of Transportation, United Parcel Service, U.S. Postal Service, and General Accounting Office.

Cut off annually, destroy when 1 year old.

63I11 - 63I14. Reserved.

63I15. Agreement files. Documents accumulated relating to agreements between Supply Distribution and other activities on transportation and movement matters. Included are files on security, requests for traffic data, transportation zonal system, and related records.

Cut off annually, hold 2 years, and retire to FRC. Destroy when 5 years old.

*NEW*

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Use broken line for drawing change lines.