

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-GRS-2017-0002

Status: APPROVED
Date Approved: 05/22/2017
Last Modified: 11/04/2024

General Information

Agency or Establishment	General Records Schedules (National Archives and Records Administration)
Record/Scheduling Group	GRS - General Records Schedules
Records Schedule Applies To	Government-wide All agencies except:
Schedule Subject	GRS 6.5: Public Customer Service Records
Additional Schedule Information	This schedule covers records an agency creates or receives while providing customer service to the public. Federal agencies that provide direct services to the public operate customer call centers or service centers to assist external customers. They may provide customer support through telephone discussions (toll-free numbers), dialogue (via chat), and email.
Is There a Classified Version of This Schedule?	No
Is consultation and coordination with Tribal Governments required?	Predate requirement

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Item Count

Total number of disposition items: 2

Number of Temporary disposition items: 2

Number of Permanent disposition items: 0

Number of Items with Disposition Not Approved: 0

Number of Inactive disposition items: 0

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Outline of Records Schedule Items for DAA-GRS-2017-0002

Item #	Title	Disposition
0001	Public customer service operations records.	Temporary
0002	Customer/client records.	Temporary

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Records Schedule Items

DAA-GRS-2017-0002-0001		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	Public customer service operations records.	
Item Description	<p>Records from operating a customer call center or service center providing services to the public. Services may address a wide variety of topics such as understanding agency mission-specific functions or how to resolve technical difficulties with external-facing systems or programs. Includes:</p> <ul style="list-style-type: none">• incoming requests and responses• trouble tickets and tracking logs• recordings of call center phone conversations with customers used for quality control and customer service training• system data, including customer ticket numbers and visit tracking• evaluations and feedback about customer services• information about customer services, such as “Frequently Asked Questions” (FAQs) and user guides• reports generated from customer management data• complaints and commendation records; customer feedback and satisfaction surveys, including survey instruments, data, background materials, and reports. <p>Exclusion 1: Records of call or service centers the public uses to provide tips or allegations to oversight and enforcement agencies/offices. Agencies must schedule these records on an agency-specific schedule.</p> <p>Exclusion 2: Reports that recommend changes or revisions to an agency’s customer service operation; agencies must schedule these records on an agency-specific schedule.</p>	
Is this item media neutral?	Yes	
Is this item a Big Bucket?		
MANUAL CITATION		
Agency Code	GRS 6.5, item 010	
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS		
Does this item supersede existing disposition authorities?	Yes	
	Superseded Items	

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Superseded Item	Item Superseded in Part?	Explanation
GRS 14, dated 1952 , item 5	No	
Is this item a deviation from the GRS?	No	
DISPOSITION INSTRUCTION		
Final Disposition	Temporary	
Retention Period	Other: Destroy 1 year after resolved, or when no longer needed for business use, whichever is appropriate.	
ADDITIONAL INFORMATION		
Are any of the records covered by this item national security classified?		
GAO Approval Required	No	

DAA-GRS-2017-0002-0002		STATUS: Active	
ITEM GENERAL INFORMATION			
Item Title		Customer/client records.	
Item Description		Distribution lists used by agency to deliver specific goods or services. Records include: <ul style="list-style-type: none">• contact information for customers or clients• subscription databases for distributing information such as publications and data sets produced by the agency• files and databases related to constituent and community outreach or relations• sign-up, request, and opt-out forms	
Is this item media neutral?		Yes	
Is this item a Big Bucket?			
MANUAL CITATION			
Agency Code		GRS 6.5, item 020	
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS			
Does this item supersede existing disposition authorities?		Yes	
		Superseded Items	
Superseded Item		Item Superseded in Part?	Explanation
GRS 13 , dated 1952, item 5 / A		No	
GRS 13 , dated 1952, item 5 / B		No	
Is this item a deviation from the GRS?		No	

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DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Retention Period	Other: Delete when superseded, obsolete, or when customer requests the agency to remove the records.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	
GAO Approval Required	No

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Signatory Information

Action	User	Date
Approve	David Ferriero	05/22/2017