

Request for Records Disposition Authority

Records Schedule Number DAA-0557-2015-0006

Schedule Status Approved

Agency or Establishment Federal Motor Carrier Safety Administration

Record Group / Scheduling Group Records of the Federal Motor Carrier Safety Administration

Records Schedule applies to Department-wide

Schedule Subject CRM (Customer Relationship Management) System

Internal agency concurrences will be provided Yes

Background Information The Customer Relationship Management (CRM) system is an administrative system and not governed by a specific statute.

Item Count

Number of Total Disposition Items	Number of Permanent Disposition Items	Number of Temporary Disposition Items	Number of Withdrawn Disposition Items
1	0	1	0

GAO Approval

Outline of Records Schedule Items for DAA-0557-2015-0006

Sequence Number	
1	CRM (Customer Relationship Management) System
1.1	CRM (Customer Relationship Management) System Master Data Files Disposition Authority Number: DAA-0557-2015-0006-0008

Records Schedule Items

Sequence Number															
1	<p>CRM (Customer Relationship Management) System The CRM (Customer Relationship Management) system will track all functions associated with receiving and responding to inquiries, and providing information and services through the use of various communications media, including telephones, telecommunications devices for the deaf (TDD/TTY), e-mail, postal mail, facsimile (fax), the Internet, and other media as appropriate. The system will also include an FAQ knowledge base used by agents to respond to inquiries, but will also include public content for customers to access via self-service customer portal on the FMCSA web site. Input records covered by DAA-GRS-2013-0001-0001 Item 10 for hard copy and analog, and by DAA-GRS-2013-0001-0004 Item 20 for electronic input/source records. Output ad-hoc records are covered by DAA-GRS-2013-0001-0005 Item 30, and output data file records are covered by DAA-GRS-0001-0006 Item 31.</p>														
1.1	<p>CRM (Customer Relationship Management) System Master Data Files Disposition Authority Number DAA-0557-2015-0006-0008</p> <p>Data points for the Master Files include but are not limited to customer names, contact information, dates of inquiry, departmental responses, information updates, and response information.</p> <table> <tr> <td>Final Disposition</td><td>Temporary</td></tr> <tr> <td>Item Status</td><td>Active</td></tr> <tr> <td>Is this item media neutral?</td><td>Yes</td></tr> <tr> <td>Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing?</td><td>Yes</td></tr> <tr> <td>Do any of the records covered by this item exist as structured electronic data?</td><td>Yes</td></tr> </table> <p>Disposition Instruction</p> <table> <tr> <td>Cutoff Instruction</td><td>Event is end of product lifecycle. Keep until event occurs, and then until no longer needed for conducting business.</td></tr> <tr> <td>Retention Period</td><td>Destroy 20 year(s) after after end of product lifecycle and then until no longer needed for conducting business.</td></tr> </table> <p>Additional Information</p>	Final Disposition	Temporary	Item Status	Active	Is this item media neutral?	Yes	Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing?	Yes	Do any of the records covered by this item exist as structured electronic data?	Yes	Cutoff Instruction	Event is end of product lifecycle. Keep until event occurs, and then until no longer needed for conducting business.	Retention Period	Destroy 20 year(s) after after end of product lifecycle and then until no longer needed for conducting business.
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GAO Approval

Not Required

Agency Certification

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposition of its records and that the records proposed for disposal in this schedule are not now needed for the business of the agency or will not be needed after the retention periods specified.

Signatory Information

Date	Action	By	Title	Organization
03/17/2015	Certify	Herman Dogan	Records Management Officer	Federal Motor Carrier Safety Administration - Analysis Division
04/02/2015	Return for Revision	Jim Cassedy	Appraiser	National Archives and Records Administration - Records Management Services
07/12/2016	Submit For Certification	Roxane Oliver	Management Analyst	Office of Analysis, Research and Technology (MC-RR) - Analysis Division(MC-RRA)
09/21/2016	Return to Submitter	Roxane Oliver	Management Analyst	Office of Analysis, Research and Technology (MC-RR) - Analysis Division(MC-RRA)
09/21/2016	Submit For Certification	Roxane Oliver	Management Analyst	Office of Analysis, Research and Technology (MC-RR) - Analysis Division(MC-RRA)
10/27/2016	Certify	Roxane Oliver	Management Analyst	Office of Analysis, Research and Technology (MC-RR) - Analysis Division(MC-RRA)
06/30/2017	Submit for Concurrence	Robyn Dexter	Appraisal Archivist	National Archives and Records Administration - RDTP2
07/11/2017	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - ACNR Records Management Services

07/11/2017	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - ACNR Records Management Services
07/13/2017	Approve	David Ferriero	Archivist of the United States	Office of the Archivist - Office of the Archivist