

GENERAL RECORDS SCHEDULE 6.5: Public Customer Service Records

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.

Item	Records Description	Disposition Instruction	Disposition Authority
010	<p>Public customer service operations records. 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>	<p>Temporary. Destroy 1 year after resolved, or when no longer needed for business use, whichever is appropriate.</p>	DAA-GRS-2017-0002-0001
020	<p>Customer/client records. Distribution lists used by an agency to deliver specific goods or services. Records include:</p> <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 	<p>Temporary. Delete when superseded, obsolete, or when customer requests the agency to remove the records.</p>	DAA-GRS-2017-0002-0002