

RECORDS MAINTENANCE PLAN

PAGE PAGES

OF

NAME OF ACTION OFFICE

FOR FY

CORRESPONDENCE SYMBOL

PREPARED BY (Custodian) (Name and date)

REVIEWED BY (Supervisor) (Name and date)

APPROVED BY (Records Officer) (Name and date)

RECORD SYMBOL

TITLE OF CATEGORIES

CUTOFF DATE

DISPOSITION DATE

INSTRUCTIONS FOR PREPARING GSA FORM 2039,
RECORDS MAINTENANCE PLAN

Prepare a minimum of an original and two copies for each records station annually. GSA Form 2039 is the first page of the records plan for each office. Use plain bond paper for continuation sheets, if needed.

From the appropriate chapters of OAD P 1820.2, GSA Records Maintenance and Disposition System, select the alphanumeric symbol and title for each primary record category accumulated at your records stations. An alphanumeric symbol and title is assigned to each paragraph that provides documentation, maintenance, and disposition instructions for the records described in OAD P 1820.2.

Category 9A1, Records Maintenance Plan, is mandatory for each records station and is the first item listed on the plan.

Enter symbols of primary records categories in alphanumeric order. Where needed as a location aid, the title of a secondary category or subdivision for which a folder has been established is indented two spaces and entered immediately beneath the primary record category. When listing tertiary subdivisions of secondary categories, indent four spaces.

Under Cutoff Date, enter the date (month/year) on which the records, according to OAD P 1820.2, are scheduled to be cut off. Records may be cut off monthly, quarterly, semiannually, annually, or on the occurrence of an event. Consult the specific record category in OAD P 1820.2 for the correct cutoff date.

Under Disposition Date, enter the date (month/year) on which the records, according to OAD P 1820.2, are no longer needed in current office space. Disposition actions may include transfer to Federal records centers or agency storage facilities, transfer from one Federal agency to another, transfer of permanent records to the National Archives, or disposal of temporary records. Consult the specific record category in OAD P 1820.2 for the correct course of action and disposition date.

After initial concurrence of your supervisor, forward all copies through your service or staff office records liaison officer to the records officer for approval. After approval, one copy is returned through the same channel to the records custodian. The other is retained by the records officer.