
Request for Change in
HUD Records Schedule

U.S. Department of Housing
and Urban Development

- | | |
|--|--|
| 1. To:
(Name), IPS RMLO
Resource Management Staff, AIR
Rm. 4156 | 2. From:
(Name)
(Name of SEG Branch filling
out Form)
(Room and telephone numbers) |
|--|--|
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3. Number and Title of Schedule

As appropriate. (The DRMO in OAMS will decide this.)

4. Type of Change Needed (Check appropriate box)

- Add new item following Item Number __ (leave blank)__. Recommend wording new item as shown on attached sheet(s). (Attach Files Survey form covering new record series). (Attach model records disposition schedule with any changes).

- Consolidate Item Numbers _____ into a new Item Number _____ to read as shown on attached sheet(s).

- Revise Item Number _____ by:
 - Rewording the description of records as shown on attached sheet(s).
 - Shortening the retention period so the disposition reads as shown on attached sheet(s).
 - Lengthening the retention period so the disposition reads as shown on attached sheet(s).

- Delete Item Number _____ by:
 - File no longer kept.
 - Function and files transferred to _____ (Give name of organization)
 - Program or function discontinued.
 - Other (Specify)

(Give details or further explanation on additional sheets of plain bond)

5. Justification (Use additional sheets of plain bond, if needed.)

(Give the names, offices and telephone numbers of the ADP system sponsor and CSG contact here.)

(Attach justification for retention periods longer than the model.)

6. Signature and Title of Preparer Date

Previous edition may be used until supply is exhausted.

HUD-552 (9-85)

1

6/89

APPENDIX 2

7. Name of Reviewing Officer

(The IPS RMLO fills out block 7 and forwards to DRMO in OAMS.)

Remarks and Recommendations

Signature and Title of Reviewer

Date

8.

___ Concur/Submit to GAO and NARA for approval

___ Nonconcur because: (Specify below)

(The DRMO in OAMS fills out block 8.)

Departmental Records Management Officer

Date

Instructions

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1. Show the reviewing office to which the request is being sent. Field Offices must submit the request (original and 2 copies) to their Regional Office, Attention: Records Management Liaison Officer, for review. Headquarters offices must submit the request (original and 2 copies) to the appropriate Records Management Liaison Officer in Headquarters for review. See the instructions in 7 below.
 2. Show the preparing office down to branch level, if applicable.
 3. Give the number and title of the HUD schedule to be changed.
 4. Specify the type of change recommended by checking the appropriate box and filling in the related blanks, if any. Recommend how the item should be worked or make other comments

on plain bond and attach to this Form. A separate form should be prepared for each item to be added, changed or deleted. For a new schedule item, attach a copy of the completed File Survey (Form HUD-67) covering the new record series.

5. Provide justification for the change. Changes involving retention periods must be based on specific administrative, legal or fiscal requirements.
6. Include the signature and title of the head of the preparing office and the date.
7. Block 7 is to be completed by the reviewing office identified in 1 above. Complete the Block as follows:

Enter the name of the reviewing office. Then make any appropriate remarks or recommendations on the proposed change. Finally, include the signature and title of the reviewing office official and the date. After completing Block 7, the reviewing office will keep 1 copy and send the original and 1 copy to the Departmental Records Management Officer in Headquarters.

8. The Departmental Records Management Officer (DRMO) will review and evaluate the request and the reviewing office's recommendations and will also coordinate the request with other affected offices. If the DRMO concurs, he/she will check the appropriate box and submit the proposed change to the General Accounting Office, if needed, and to the National Archives and Records Administration for approval. If the DRMO does not concur, she/he will check that box and give the reasons for the nonconurrence. In either case, the DRMO will sign and date Block 8 and keep the original of the request. The remaining copy will be return to the preparing office as notice of the action taken.