REQUEST FOR RECORDS DISPOSITION AUTHORITY

To NATIONAL ARCHIVES & RECORDS ADMINISTRATION
8601 ADELPHI ROAD COLLEGE PARK, MD 20740-6001

1 FROM
Social Security Administration

2 MAJOR SUBDIVISION
Office of Publications and Logistics Management

3 MINOR SUBDIVISION
Office of Document, Center for Records Management

4 NAME OF PERSON WITH WHOM TO CONFER
Joyce Huber, SSA Records Officer

5 TELEPHONE NUMBER
410-965-5555
410-966-1704 (fax)

ARCHIVIST OF THE UNITED STATES

6 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 propose for disposal on the attached page(s) are not needed now for the business for this agency or will not be needed after the retention period specified, and that written concurrence from the General Accounting Office, under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies.

7 ITEM NO

8 DESCRIPTION OF ITEM AND PROPOSED DISPOSITION

SEE ATTACHED SHEETS

Social Security Administration Records
Forms Management Files
Office of Origin:
Deputy Commissioner for Budget, Finance & Management
Office of Publications Management
1405 Annex Building
6401 Security Boulevard
Baltimore, Maryland 21235-6401

Scheduling Authority:
Social Security Administration
Deputy Commissioner for Budget, Finance & Management
Center for Records Management
Joyce Huber, SSA Records Officer
Room 1524 Annex Building
6401 Security Boulevard
Baltimore, MD 21235-6401
410-965-5555

115-109 PREVIOUS EDITION NOT USABLE
I. Forms Management Folder Records

This schedule provides authoritative instructions for the disposition of agency forms management records, regardless of media. These files are maintained by the Forms Management Team (FMT) in the Office of Publications and Logistics Management (OPLM).

A. Forms History Folder Records

These records contain documents accumulated in evaluating the requirement for, designing and procuring a particular SSA form. Included are justification statements (Form SSA-5100, Request for Forms Action), internal and OMB clearances, camera copies, memorandums and notes to the file, copies of printing requisitions (Form SSA-100, SSA Printing Requisition) and specifications, procurement documents, delivery instructions, samples, copies of approved suggestions, history sheets (Form SSA-5082 or SSA-5082A, Form History) and similar documents.

Disposition: Temporary.

Cut off history record when form becomes obsolete. When a form becomes obsolete, move the history folder from active storage to obsolete storage. Physical folders will be maintained in on-site obsolete storage for one calendar year. After one year, they will be moved to an off-site holding facility. Electronic folders will be moved out of the active directory to an inactive holding directory for a period of time matching the physical folders.

Destroy five years later.

B. Forms Inventory Control System (FICS)

This catalog contains supplementary information about forms used throughout the agency. The FICS also allows users throughout the agency to reserve form numbers to create new SSA forms. An FMT analyst will enter the obsolete year within FICS. FICS will show the record as obsolete on our public-facing website. FICS will automatically remove the record from the public-facing website upon destruction of the physical history folder. Each form is listed as a separate entry. Each record contains the following information about the form:

- form number
- whether form is new or revised
- date received
- authoring organization
- form title
- author/originator
- author’s phone number
- author’s building and room number
- whether the form is for public or internal use
- accession number
- box number
- whether the form supersedes another form.
• date obsolete
• links to SSA forms

**Disposition: Temporary.**

Cut off inventory control record when form becomes obsolete. FMT retains these records for a period of 100 years as a record of a form’s existence beyond destruction of the history folder.

Destroy 100 years later.