

**REQUEST FOR AUTHORITY
 TO DISPOSE OF RECORDS**

(See Instructions on Reverse)

47

TO: GENERAL SERVICES ADMINISTRATION,
 NATIONAL ARCHIVES AND RECORDS SERVICE, WASHINGTON 25, D. C.

LEAVE BLANK	
DATE RECEIVED DEC 11 1975	JOB NO.
DATE APPROVED	NC1-47-76-49

1. FROM (AGENCY OR ESTABLISHMENT)
 Department of Health, Education, and Welfare

2. MAJOR SUBDIVISION
 Social Security Administration

3. MINOR SUBDIVISION
 Bureau of Disability Insurance

4. NAME OF PERSON WITH WHOM TO CONFER
 George S. Yamamura

5. TEL. EXT.
 45750

NOTIFICATION TO AGENCY

In accordance with the provisions of 44 U.S.C. 3303a the disposal request, including amendments, is approved except for items that may be stamped "disposal not approved" or "withdrawn" in column 10.

12-23-75 *James E. O'Neill*
 Date Archivist of the United States
 ACTING

6. CERTIFICATE OF AGENCY REPRESENTATIVE:

I hereby certify that I am authorized to act for the head of this agency in matters pertaining to the disposal of records, and that the records described in this list or schedule of _____ pages are proposed for disposal for the reason indicated: ("X" only one)

- A The records have ceased to have sufficient value to warrant further retention.
- B The records will cease to have sufficient value to warrant further retention on the expiration of the period of time indicated or on the occurrence of the event specified.

11/25/75 (Date) *[Signature]* (Signature of Agency Representative) *Dept. of Health, Education & Welfare* (Title)

7. ITEM NO.	8. DESCRIPTION OF ITEM (WITH INCLUSIVE DATES OR RETENTION PERIODS)	9. SAMPLE OR JOB NO.	10. ACTION TAKEN
-------------	---	----------------------	------------------

RECORDS RETENTION AND DISPOSAL SCHEDULE
BUREAU OF DISABILITY INSURANCE

I. STATE AGENCY BUDGET AND FINANCIAL REPORT FILES

These files consist of records which are used to estimate, justify, and approve State agency Disability Insurance budgets, and to account for funds received and expended by State agencies. Included are Forms SSA-870, State Agency Budget Request for Disability Program; SSA-870A, State Agency Budget List of Disability Program Positions (Full Time); SSA-870B, State Agency Budget List of Disability Program Positions (Part Time and Temporary); SSA-870C, State Agency Budget Schedule for Administration; SSA-871, State Agency Schedule for Equipment Purchases; SSA-872, State Agency Budget Approval for Disability Program; SSA-874, Financial Accountability Statement for Disability Program; SSA-874A, Report of Obligations for Disability Program; SSA-874B, Time Report of Personal Services for Disability Program; or their equivalents. Also included are monthly summary reports of obligations (telegrams), related supplemental material, and similar records.

A. BDI Central Office

Destroy after DHEW audit and final settlement.

12/15/75
 Changes in I-B and II-B with SSA approval
 in accordance with GAO instructions
 Submitted by SSA for GAO approval.
 Copy to Agency & All FRC's
 12-30-75

REQUEST FOR AUTHORITY TO DISPOSE OF RECORDS—Continuation Sheet

7. ITEM NO.	8. DESCRIPTION OF ITEM (WITH INCLUSIVE DATES OR RETENTION PERIODS)	9. SAMPLE OR JOB NO.	10. ACTION TAKEN
	<p>B. <u>BDI Regional Offices</u></p> <p>Close out at the end of the fiscal year covered by the budget. Hold 4 additional years and then transfer to an FRC using Record Group 217. Records predating July 2, 1975: Destroy 10 years and 3 months after the period of the account. Records created on or after July 2, 1975: Destroy 6 years and 3 months after the period of the account.</p> <p>C. <u>State Agencies</u></p> <p>Destroy after DHEW audit and final settlement.</p> <p>II. <u>STATE AGENCY COST ALLOCATION FILES</u></p> <p>These files consist of copies of agreements entered into with State governments and certain State agencies by the Secretary of Health, Education, and Welfare which specify the percentage of charges allowable for indirect costs. (Original cost allocation agreements are retained by DHEW.) The records are used to determine the amounts allowable for indirect costs in State agency budget requests.</p> <p>A. <u>BDI Central Office</u></p> <p>Destroy after DHEW audit and final settlement.</p> <p>B. <u>BDI Regional Offices</u></p> <p>Close out at the end of the fiscal year covered by the budget. Hold 4 additional years and then transfer to an FRC using Record Group 217. Records predating July 2, 1975: Destroy 10 years and 3 months after the period of the account. Records created on or after July 2, 1975: Destroy 6 years and 3 months after the period of the account.</p> <p>C. <u>State Agencies</u></p> <p>Destroy after DHEW audit and final settlement.</p>		