

REQUEST FOR RECORDS DISPOSITION AUTHORITY
(See Instructions on reverse)

TO: NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NIRA)
 WASHINGTON, DC 20408

1. FROM (Agency or establishment)
 Railroad Retirement Board

2. MAJOR SUBDIVISION
 Bureau of Information Resources Management

3. MINOR SUBDIVISION

4. NAME OF PERSON WITH WHOM TO CONFER
 Chuck Mierzwa

5. TELEPHONE
 (312) 751-3363

LEAVE BLANK (NARA use only)

JOB NUMBER
 NI-184-93-2

DATE RECEIVED
 12-11-92

NOTIFICATION TO AGENCY

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request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10.

DATE for ARCHIVIST OF THE UNITED STATES
 3/23/93 James D. Moore

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 proposed for disposal on the attached ___ page(s) are not now needed for the business of this agency or will not be needed after the retention periods 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,

is not required; is attached; or has been requested.

DATE 12/09/92	SIGNATURE OF AGENCY REPRESENTATIVE <i>Chuck Mierzwa</i> Chuck Mierzwa	TITLE Agency Records Officer
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7. ITEM NO.	8. DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9. GRS OR SUPERSEDED JOB CITATION	10. ACTION TAKEN (NARA USE ONLY)
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2-2	<p><u>Actuarial Valuation Data Summaries</u></p> <p>Mathematical summarizations of computer-generated data for use in triennial actuarial valuations. Includes data on mortality rates, retirement rates, service patterns, salaries and related papers.</p> <p><u>Proposed Disposition</u></p> <p>Destroy when no longer needed for administrative use.</p>	<p>NCI -184-88-1 Item 2-2</p>	
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Copies sent to Agency

EXPLANATORY NOTES

FUNCTIONAL STATEMENT

The Bureau of the Actuary is responsible for the preparation of estimates of the liabilities created by the 1974 Railroad Retirement Act (RRA). The bureau also prepares a five-year projection of anticipated revenues to and payments from the Railroad Retirement Account and a report of the actuarial status of the railroad retirement system under various economic and employment assumptions. In connection with these actuarial valuations, the bureau conducts studies of rates of mortality, disability, retirement, withdrawal, family composition and other factors. The bureau prepares long-range projections of the financial effects of proposed amendments to the RRA and Railroad Retirement Tax Act. The bureau recommends to the Board Members the rate of tax necessary to finance the supplemental annuity program.

Item 2-2

Actuarial Valuation Data Summaries

Current disposition: Destroy after completion of 4th subsequent valuation.

Proposed disposition: Destroy when no longer needed for administrative use.

Summaries consist of computer generated data used in triennial actuarial valuations. Includes data on mortality rates, retirement rates, service patterns, salaries, and related papers. It has been the experience of bureau personnel that much of the material has long-term reference value. Thus, a change from current retention of "destroy after completion of 4th subsequent valuation" to "destroy when no longer needed for administrative use" has been requested. The proposed retention better satisfies the administrative and reference needs of the bureau.

Bureau of Actuary

The Bureau of the Actuary is responsible for the preparation of estimates of the liabilities created by the 1974 Railroad Retirement Act. The bureau also prepares a five-year projection of anticipated revenues to and payments from the Railroad Retirement Account and a report on the actuarial status of the railroad retirement system under various economic and employment assumptions. In connection with these actuarial valuations, the bureau conducts studies of rates of mortality, disability, retirement, withdrawal, family composition and other factors. The bureau prepares long-range projections of the financial effects of proposed amendments to the Railroad Retirement Act and Railroad Retirement Tax Act. The bureau recommends to the Board the rate of tax necessary to finance the supplemental annuity program.

<u>ITEM NO.</u>	<u>DESCRIPTION OF RECORDS</u>	<u>AUTHORIZED DISPOSITION</u>
2-1	<u>Actuarial Valuations</u> Financial actuarial valuations of RRB assets and Liabilities under the Railroad Retirement Act. (a) Record copy. (b) Other copies.	 Transfer PERMANENT. Offer to National Archives when 25 years old, later in 10 year blocks. Destroy when no longer needed for administrative use.

JOB: NCI-184-79-3 Item 2-1

2-2	<u>Actuarial Valuation Data Summaries</u> Mathematical summarizations of computer generated data for use in triennial actuarial valuations. Includes data on mortality rates, retirement rates, service patterns, salaries, and related papers.	 Destroy after completion of 4th subsequent valuation.
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JOB: NCI-184-79-3 Item 2-2

uations of RRB assets and liabilities under the Railroad Retirement Act.

1938 - 1979; 1 cft; approx. 200 page accumulation/year; arranged chronologically.

PERMANENT. Offer to National Archives with related agency records approved for permanent retention in schedule or when 15 years old, whichever is sooner. *offer in 10 year blocks. 5/3-11-81*

2-2

Actuarial Valuation Data Summaries

Mathematical summarizations of computer generated data for use in triannual actuarial valuations. Includes data on mortality rates, retirement rates, service patterns, salaries, and related papers.

DESTROY after completion of 4th subsequent valuation.

2-3

Actuarial Notes

Statistical and narrative informational response by the Bureau of Actuary on a wide variety of topics related to RRB operations.

DESTROY when no longer needed for administrative use.

2-4

Valuation Computer Generated Printouts

Computer generated printouts including data pertaining to benefit schedules, awards, projections, earnings. Used to prepare Actuarial Valuation Data Summaries.

DESTROY when subsequent 2 valuations are completed.

2-5

Actuarial Studies

Bound volumes of actuarial studies including occupational differences in separation rates for railroad workers, the railroad retirement disability program, method of financing the railroad retirement system, and related programs.

(a) Record copy.