

REQUEST FOR AUTHORITY
TO DISPOSE OF RECORDS

(See Instructions on Reverse)

LEAVE BLANK	
DATE RECEIVED MAR 31 1976	JOB NO.
DATE APPROVED NC1 - 47-76-23	

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

1. FROM (AGENCY OR ESTABLISHMENT)

Department of Health, Education, and Welfare

2. MAJOR SUBDIVISION

Social Security Administration

3. MINOR SUBDIVISION

Office of Program Operations

4. NAME OF PERSON WITH WHOM TO CONFER

George S. Yamamura

5. TEL. EXT.

45770

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.

3/26/76

(Date)

Eugene T. Reed, Jr.

(Signature of Agency Representative)

Acting Dept. Records Mgt. Office

(Title)

7. ITEM NO.	8. DESCRIPTION OF ITEM (WITH INCLUSIVE DATES OR RETENTION PERIODS)	9. SAMPLE OR JOB NO.	10. ACTION TAKEN
	<p><u>RECORDS RETENTION AND DISPOSAL SCHEDULE</u></p> <p><u>OFFICE OF PROGRAM OPERATIONS</u></p> <p><u>Representative Payee Onsite Review Data Files</u></p> <p>These files contain material accumulated during the onsite review of State institutions which serve in a representative payee capacity for Retirement and Survivors Insurance beneficiaries. Included in the files are questionnaires containing data on the institution's policies regarding representative payee cases (policy questionnaires), questionnaires containing data on the institution's handling of specific sample cases (beneficiary questionnaires), and tabulations of these data. The files are housed in the program service centers. They must be retained in the event that legal action is instituted against the institution for mishandling of funds in its representative payee capacity.</p> <p>Transfer to the Federal Records Center (FRC) upon completion of the next subsequent review of the institution or after 2 years, whichever is earlier. Destroy after 5 years' retention in the FRC.</p>		

Copy to Agency + ALL FRC's 4-23-76