

REQUEST FOR RECORDS DISPOSITION AUTHORITY (See Instructions on reverse)		LEAVE BLANK	
TO: GENERAL SERVICES ADMINISTRATION NATIONAL ARCHIVES AND RECORDS SERVICE, WASHINGTON, DC 20408		JOB NO. NI-146-87-2	DATE RECEIVED 8-3-87
1. FROM (Agency or establishment) U.S. Office of Personnel Management		NOTIFICATION TO AGENCY	
2. MAJOR SUBDIVISION Office of Information Management		In accordance with the provisions of 44 U.S.C. 3303a the disposal request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10. If no records are proposed for disposal, the signature of the Archivist is not required.	
3. MINOR SUBDIVISION Information Systems Plans and Policies Division			
4. NAME OF PERSON WITH WHOM TO CONFER Charles R. Chesek			
5. TELEPHONE EXT. 632-7720		DATE 10/22/87	ARCHIVIST OF THE UNITED STATES <i>Frank A. Burke</i>
6. CERTIFICATE OF AGENCY REPRESENTATIVE			

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposal of the agency's records; that the records proposed for disposal in this Request of 4 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, if required under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies, is attached.

A. GAO concurrence: ☐ is attached; or ☒ is unnecessary.

B. DATE 7/29/87	C. SIGNATURE OF AGENCY REPRESENTATIVE <i>William C. Duffy</i> William C. Duffy	D. TITLE Chief, Information Systems Plans and Policies Division	
7. ITEM NO.	8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)	9. GRS OR SUPERSEDED JOB CITATION	10. ACTION TAKEN (NARS USE ONLY)
1	<p>Amend item 12 (Retirement Annuity Roll Questionnaire), of Administrative Manual Supplement 44-3, Disposition of Records, as per attached.</p> <p>Forms RI 25-14 and 25-15 are designed to collect information about marital status, current school attendance, and future plans for school attendance by student survivor annuitants between the ages of 18 and 22. This information is used to determine the students entitlement to continue to receive survivor benefits from the Civil Service Retirement System.</p> <p>Form RI 25-14 is a self-certification form which is mailed annually to the payee 6-weeks prior to the beginning of the school year. The form asks the payee to provide information about the student for the upcoming year.</p> <p>Form RI 25-15 is a follow-up survey form mailed each spring to the payee to verify the students eligibility for benefits paid based on his/her prior certification. In addition, this form is used to determine the students intention for the next school year so that benefits will not be interrupted for the summer period.</p>	NCI-146-84-3	

copies to agency, NNP

Item No.	Title and Description of Records	Disposition
	10. Summary of Contributions, Summary of Contributions, or equivalent.	Transfer to System File upon receipt of annual statement of contributions, or death benefits.
11	Annuitant Award Correspondence File	Break annually. Destroy 1 year after break.
12	Retirement Annuity Roll Questionnaires.	
	a. Report of Income, BRL Form 49-160, or equivalent.	Break annually. Destroy 6 years after break.
	b. Self-Certification of Full-Time School Attendance, Form RI 25-14, or equivalent.	Break annually. Destroy 6 years after break.
	c. Self-Certification of Full-Time School Attendance, Form RI 25-14, or equivalent.	Break by school year. Destroy 6 calendar years after break.
	d. Survey of Student's Eligibility to Receive Benefits, Form RI 25-15, or equivalent.	Break by school year. Destroy 6 calendar years after break.
13	Report of Withholding and Contributions, SS-2012, or equivalent.	Break annually after reconciliation procedures are completed. Destroy 3 years after break.
14	Retirement Expenditures Accounting Records.	
	a. General accounts ledger showing debits and credits entries and reflecting expenditures in summary.	Destroy 6 years after the close of the fiscal year involved.
	b. Records used in accounting for expenditures.	Destroy immediately after break.
15	Voucher and Schedule of Payments for Retirement Claims, BRL Forms 40-86 and 86a, or equivalent.	Break annually. Destroy after GAO, whichever is earlier.
16	Disability Retirement Case Files.	Destroy 15 years from date of approval of retirement or date when application for benefits is received.
17	Good Interest for Temporary Disability Retirement Cases, BRL Form 40-86 or equivalent.	Destroy when enrollment is received, converted to permanent status, AGO 60, or when case is closed.
18	AGO 60-15 Retirement Indent.	