

Request for Records Disposition Authority

Records Schedule Number **DAA-0362-2018-0003**

Schedule Status **Approved**

Agency or Establishment **Corporation for National and Community Service**

Record Group / Scheduling Group **Records of the Corporation for National and Community Service**

Records Schedule applies to **Major Subdivision**

Major Subdivision **Office of the National Service Trust**

Schedule Subject **Office of the National Service Trust Member Payment Records**

Internal agency concurrences will be provided **No**

Background Information **Forms and form packages used by CNCS National Service Trust Office to document all requests for payment and use of member educations awards, student loan interest payments, and other qualifying loan/education expenses associated with the education award.**

Item Count

Number of Total Disposition Items	Number of Permanent Disposition Items	Number of Temporary Disposition Items	Number of Withdrawn Disposition Items
8	0	8	0

GAO Approval

Outline of Records Schedule Items for DAA-0362-2018-0003

Sequence Number	
1	Office of the National Service Trust - Member Payment Forms
1.1	Voucher Payment Request Form Disposition Authority Number: DAA-0362-2018-0003-0001
1.2	Interest Payment Request Form Disposition Authority Number: DAA-0362-2018-0003-0002
1.3	Payment Request Review Form Disposition Authority Number: DAA-0362-2018-0003-0003
2	Office of the National Service Trust - Additional Trust Forms and Institution Documents
2.1	Forbearance Request for National Service Form Disposition Authority Number: DAA-0362-2018-0003-0004
2.2	Member Extension Requests Disposition Authority Number: DAA-0362-2018-0003-0005
2.3	Member Transfer Documentation Disposition Authority Number: DAA-0362-2018-0003-0006
2.4	Supporting Documentation for Payments/Interest Disposition Authority Number: DAA-0362-2018-0003-0007
2.5	Request to Reissue Check/EFT - Payment Review Form Disposition Authority Number: DAA-0362-2018-0003-0008

Records Schedule Items

Sequence Number	
1	<p>Office of the National Service Trust - Member Payment Forms Forms and form packages used by CNCS National Service Trust Office to document all requests for payment and use of member educations awards, student loan interest payments, and other qualifying loan/education expenses associated with the education award.</p>
1.1	<p>Voucher Payment Request Form Disposition Authority Number DAA-0362-2018-0003-0001</p> <p>The Voucher Payment Request Form is used by AmeriCorps members to request payment from their education award account to be disbursed to a qualified institution for qualified loan and/or current education expenses.</p> <p>Final Disposition Temporary</p> <p>Item Status Active</p> <p>Is this item media neutral? Yes</p> <p>Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? Yes</p> <p>Do any of the records covered by this item exist as structured electronic data? No</p> <p>Disposition Instruction</p> <p>Cutoff Instruction Cut off at the end of fiscal year the voucher was processed.</p> <p>Retention Period Destroy 12 year(s) after cutoff.</p> <p>Additional Information</p> <p>GAO Approval Not Required</p>
1.2	<p>Interest Payment Request Form Disposition Authority Number DAA-0362-2018-0003-0002</p> <p>The Interest Payment Request Form is used by AmeriCorps members to request the National Service Trust to pay, on behalf of the borrower, all or a portion of the interest that accrued on a qualified student loan during the member's term of national service.</p> <p>Final Disposition Temporary</p>

Item Status Active

Is this item media neutral? Yes

Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? Yes

Do any of the records covered by this item exist as structured electronic data? No

Disposition Instruction

Cutoff Instruction Cut off at the end of fiscal year the form was processed.

Retention Period Destroy 12 year(s) after cutoff

Additional Information

GAO Approval Not Required

Payment Request Review Form

Disposition Authority Number DAA-0362-2018-0003-0003

The Payment Request Review Form is a document package used by CNCS Trust staff to document AmeriCorps member requests for payment that require higher level review such as: after the expiration of the 7 year's use periods for education awards; with member signature dates greater than 90 days old; and interest payment requests greater than \$5,000.00.

Final Disposition Temporary

Item Status Active

Is this item media neutral? Yes

Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? Yes

Do any of the records covered by this item exist as structured electronic data? No

Disposition Instruction

Cutoff Instruction Cut off at the end of fiscal year the form is adjudicated.

Retention Period Destroy 12 year(s) after cutoff.

Additional Information

1.3

	GAO Approval	Not Required
2	Office of the National Service Trust - Additional Trust Forms and Institution Documents Additional forms and packages used by CNCS Trust Office to document all other requests for payment and use of member educations awards, student loan interest payments, and other qualifying loan/education expenses associated with the education award.	
2.1	Forbearance Request for National Service Form Disposition Authority Number DAA-0362-2018-0003-0004 Form used by AmeriCorps members to request a forbearance period for their student loan for national service. Final Disposition Temporary Item Status Active Is this item media neutral? Yes Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? No Disposition Instruction Cutoff Instruction Cut off at the end of fiscal year the form was received. Retention Period Destroy 4 year(s) after cutoff. Additional Information GAO Approval Not Required	
2.2	Member Extension Requests Disposition Authority Number DAA-0362-2018-0003-0005 The member extension request package consists of original education award extension request documentation from members and extension request review and an approvals from official designee and others. Final Disposition Temporary Item Status Active Is this item media neutral? Yes Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? No	

2.3

Disposition Instruction

Cutoff Instruction Cut off at the end of fiscal year the extension request is adjudicated.

Retention Period Destroy 4 year(s) after cutoff.

Additional Information

GAO Approval Not Required

Member Transfer Documentation

Disposition Authority Number DAA-0362-2018-0003-0006

Documentation associated with the transfer of an education award. Recipients of a transferred award may use the award within 10 years from the date which the member who transferred the award completed their term of service.

Final Disposition Temporary

Item Status Active

Is this item media neutral? Yes

Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? No

Disposition Instruction

Cutoff Instruction Cut off at the end of fiscal year the award was transferred.

Retention Period Destroy 4 year(s) after cutoff.

Additional Information

GAO Approval Not Required

2.4

Supporting Documentation for Payments/Interest

Disposition Authority Number DAA-0362-2018-0003-0007

Supporting documentation pertaining to members' payments and interest to include invoices and other miscellaneous supporting documentation.

Final Disposition Temporary

Item Status Active

Is this item media neutral? Yes

Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? No

2.5

Disposition Instruction

Cutoff Instruction Cut off at the end of fiscal year from the date the member earns their education award.

Retention Period Destroy 4 year(s) after cutoff.

Additional Information

GAO Approval Not Required

Request to Reissue Check/EFT - Payment Review Form

Disposition Authority Number DAA-0362-2018-0003-0008

Form used to document all reissuance of payments.

Final Disposition Temporary

Item Status Active

Is this item media neutral? Yes

Do any of the records covered
by this item currently exist in
electronic format(s) other than e-
mail and word processing? No

Disposition Instruction

Cutoff Instruction Cut off at the end of the fiscal year from the date the reissue is processed.

Retention Period Destroy 4 year(s) after cutoff.

Additional Information

GAO Approval Not Required

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 in this schedule are not now needed for the business of the agency or will not be needed after the retention periods specified.

Signatory Information

Date	Action	By	Title	Organization
11/13/2017	Certify	Jennifer Veazey	Support Services Specialist	CNS - CNS
11/15/2017	Return for Revision	Ashby Crowder	Archives Specialist	National Archives and Records Administration - ACRA
11/15/2017	Submit For Certification	Jennifer Veazey	Support Services Specialist	CNS - CNS
11/15/2017	Certify	Jennifer Veazey	Support Services Specialist	CNS - CNS
12/20/2017	Return for Revision	Ashby Crowder	Archives Specialist	National Archives and Records Administration - ACRA
01/23/2018	Submit For Certification	Jennifer Veazey	Support Services Specialist	CNS - CNS
01/24/2018	Certify	Jennifer Veazey	Support Services Specialist	CNS - CNS
01/29/2018	Submit for Concurrence	Ashby Crowder	Archives Specialist	National Archives and Records Administration - ACRA
02/07/2018	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - ACNR Records Management Services
02/07/2018	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - ACNR Records Management Services
02/08/2018	Approve	David Ferriero	Archivist of the United States	Office of the Archivist - Office of the Archivist