

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0047-2024-0001

Status: APPROVED
Date Approved: 11/12/2024

General Information

Agency or Establishment	Social Security Administration
Record/Scheduling Group	0047 - Records of the Social Security Administration
Records Schedule Applies To	Agency-wide
Schedule Subject	Leadership Records
Additional Schedule Information	This bucket establishes disposition authority for SSA Leadership Records. The bucket has two (2) disposition schedules: One (1) permanent and one (1) temporary. Records documenting actions and activities of SSA senior-level officials (i.e., officials subject to Capstone) including, but not limited to, the Commissioner (COSS), Deputy Commissioner (DCOSS), Chief Information Officer (CIO), Chief of Staff, Deputy Chief of Staff, Executive Secretary, Regional Commissioners (RC), Associate Commissioners (AC), other executive personnel located in the Office of the Commissioner, Board of Trustees, and personnel acting on the Commissioner's behalf in support of SSA policies and programs.
Is There a Classified Version of This Schedule?	No
Is consultation and coordination with Tribal Governments required?	Predate requirement

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Item Count

Total number of disposition items: 2

Number of Temporary disposition items: 1

Number of Permanent disposition items: 1

Number of Items with Disposition Not Approved: 0

Number of Inactive disposition items: 0

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Outline of Records Schedule Items for DAA-0047-2024-0001

Item #	Title	Disposition
0001	Executive Leadership Records	Permanent
0002	Routine Leadership Records	Temporary

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Records Schedule Number: DAA-0047-2024-0001

Status: APPROVED
Date Approved: 11/12/2024

Records Schedule Items

DAA-0047-2024-0001-0001		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	Executive Leadership Records	
Item Description	<p>Records documenting actions and activities of SSA senior-level officials (i.e., officials subject to Capstone) including, but not limited to, the Commissioner (COSS), Deputy Commissioner (DCOSS), Chief Information Officer (CIO), Chief of Staff, Deputy Chief of Staff, Executive Secretary, Regional Commissioners (RC), Associate Commissioners (AC), other executive personnel located in the Office of the Commissioner, Board of Trustees, and personnel acting on the Commissioner's behalf in support of SSA policies and programs.</p> <p>Records include:</p> <ol style="list-style-type: none">1. Official Record copies of final formal decisions captured at the Deputy Commissioner level or higher. Records include but are not limited to Commissioner Decision Memos, reports to update the White House, organizational realignments telework evaluation/decisions, etc. These decisions are made by Senior-level Officials or other executive personnel. Note: Excluded are copies captured by all other Capstone Officials, including copies maintained at the Associate Commissioner level.2. Senior-level correspondence files captured at the Deputy Commissioner level or higher. (Including all internal and external correspondence and any associated background materials): records consist of official correspondence (e.g. drafts, memoranda, letters, and similar communications, including but not limited to associated background materials originating in, or sent to, Senior-level officials. This correspondence deals with all substantive programmatic functions of the agency and can be addressed to or sent to both internal (e.g., Office of Commissioner, Deputy Commissioners, General Counsel, or the highest level office areas, etc.) or external (e.g. Members of Congress, etc.) to the agency. Note: Excluded are copies captured by all other Capstone Officials (not mentioned above), including copies maintained at the Associate Commissioner level;	

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3. Agendas of Executive Staff meetings: Agendas typically are Microsoft Word documents that list the topics covered in Executive Staff meetings and may identify component executives' responsibility for addressing each topic. Agenda documents for Executive Staff meetings are attached to the Outlook Calendar invite;

4. Minutes of Executive Staff meetings: These records consist of minutes of meetings of executive staff, composed of the Commissioner, the Deputy Commissioner, and Deputy-Commissioner level personnel (e.g., Chief Information Officer, Chief Economist, General Counsel, etc.);

5. Senior-level correspondence control logs: These logs reflect the assignment and disposition of incoming controlled correspondence and provides metadata (e.g., to, from, supplemental information, etc.);

6. Itineraries: Itineraries are created typically as Microsoft Word documents when Senior-level Officials visit an agency office/s. The itineraries document lists the dates of a visit, identifies the location(s) to be visited and points of contact for the visit. The itinerary is attached to the Senior Official's Outlook Calendar invite for the visit. Note: With the exception of itineraries, calendars, appointment books, schedules of daily activities, and telephone logs have been converted to electronic systems such as Microsoft Outlook Calendar and our agency's Voice-over-Internet Protocol telephone system;

7. Briefing Files: These files consist of records used to prepare briefings, addresses, lectures, and other presentations to be provided to, and/or given by senior officials regarding SSA programs, policies, or functions. These include books prepared daily, or on other regular schedules, to provide the executive leadership with the latest news and other important events and issues, or for upcoming meetings or trip. Included are copies of transcripts, charts, graphs, hand-outs, and similar materials;

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8. Speeches, Talking Points, and Other Presentations by Senior Officials: Speeches are a complete written narrative of the remarks delivered by a Senior Official, whereas talking points represent bulleted statements that serve as a reminder to the Senior Official of items to include or not to include in their delivered remarks;

9. Program Delegation of Authority: Program delegations of continuing authority and revocations thereof. Included are approved program delegations of continuing authority and revocations thereof. Included are approved program delegations having statutory basis in Titles II, XVI, and XVIII of the Social Security Act, as amended, such as authority to make Federal determinations of disability, authority to enter into agreements with States, authority to determine entitlement of individuals to benefits under Title XVIII, etc.;

10. Biographical sketches, photographs, and similar documents concerning Senior-level Officials that are of significant historic importance;

11. Mission-related non-transcribed audiovisual recordings: Audiovisual recordings featuring the Commissioner and other high-level officials taking during internal and official events. Exception: Videos or audio recordings of mission-related meetings or conference proceedings that are transcribed;

12. Mission-related transcriptions to transcribed audiovisual recordings: Transcriptions of audiovisual recordings featuring the Commissioner and other high-level officials taken during internal and external official events, and/or events that are of a significant historic importance;

13. Mission-related photographs (including official portraits): Official portraits and other photographs featuring the Commissioner and other high-level officials taken during internal and official events, and/or events that are of a significant historic importance.

Is this item media neutral?	Yes
Is this item a Big Bucket?	Yes

SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS

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Does this item supersede existing disposition authorities?	Yes
Superseded Items	
Superseded Item	Item Superseded in Part? Explanation
N1-047-10-003 / A	No
N1-047-10-003 / B	No
N1-047-10-003 / C	No
N1-047-10-003 / D	No
NC-047-75-003 / 3/B/1	No
NC-047-75-007 / 5/B/1	No
NC-047-76-014 / 4/A	No
NC1-047-76-17 / 2/A	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Calendar year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Digital audio:1TB ; Digital still images:1TB ; Textual data:1TB
End year of records covered by this authority	Still being created
Date span of the initial transfer	From: 01/01/2005 To: 12/31/2024
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	No

DAA-0047-2024-0001-0002	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Routine Leadership Records
Item Description	Records include, but are not limited to, copies of records of senior-level officials maintained for business purposes by offices other than the office of record.
	Included are:

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1. Copies of formal decisions (e.g., hardship transfers, etc.) made by Senior-level Officials or by other executive personnel;

2. Briefing Files - Other Offices: Records used in briefings, speeches, lectures, and other presentations given by Senior-level officials regarding SSA programs, policies, or functions. Included are copies of transcripts, charts, graphs, handouts, and similar materials;

3. Biographical Sketches - Other Offices [Non-Capstone officials]: Biographical sketches, photographs, news clippings, and similar records concerning non-Capstone officials;

4. Transcribed Audiovisual Recordings: Recordings of audiovisual meetings for which there are transcriptions;

5. Official Internal and External Social Media Posts by Senior Officials: Outward facing agency Blog and comments received on topics such as agency goals, major public events, etc. on SSA.gov. Also includes responses to public comments and copies comments sent to another component;

6. Record copies of Approved Administrative Delegations of Authority: approved administrative delegations of authority, such as authority to process adverse actions, adverse actions, authority to award contracts, authority to approve leave and overtime, printing, procurement, and recruitment authority, etc.

Is this item media neutral? Yes

Is this item a Big Bucket? Yes

SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS

Does this item supersede existing disposition authorities? Yes

Superseded Items

Superseded Item	Item Superseded in Part?	Explanation
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NC-047-75-003 / 3/B/2	No	
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NC-047-75-007 / 5/B/2	No	
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NC-047-76-014 / 4/B	No	
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Is this item a deviation from the GRS? No

DISPOSITION INSTRUCTION

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Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Calendar year.
Retention Period	Other: Delete/destroy 10 years after cutoff unless prohibited by law, mandate, or business need.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	
GAO Approval Required	No

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Status: APPROVED
Date Approved: 11/12/2024

Signatory Information

Action	User	Date
Approve	Colleen Shogan	11/12/2024

SSA Leadership Crosswalk

Bucket	Item	Series Title	Retention	Series Level Cut off Instructions, where applicable	Current Records Description	Series Title (New Item)	Superseded Series Title	Superseded Series Description	Superseded Authority	Superseded Retention	Office of Record (for Permanent items)
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff annually at the end of the calendar year. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	Official Record copies of final formal decisions captured at the Deputy Commissioner level or higher. Records include but are not limited to Commissioner Decision Memos, reports to update the White House, organizational realignments telework evaluation/decisions, etc. These decisions are made by Senior-level Officials or other executive personnel. Note: Excluded are copies captured by all other Capstone Officials, including copies maintained at the Associate Commissioner level.		Decisions in the Office of the Commissioner	These records consist of official copies of formal decisions made by the Commissioner of Social Security, the Deputy Commissioner of Social Security, the Chief of Staff, the Deputy Chief of Staff, the Executive Secretary or by other executive personnel located in the Office of the Commissioner and acting on the Commissioner's behalf.	N1-047-10-003 / A	Permanent. Cut off records at the end of the fiscal year. Pre-accession individual electronic files to the National Archives 5 years after cutoff. Legally transfer records in an acceptable format (following current CFR guidelines) to the National Archives annually, 10 years after cutoff.	Various components 3/13/2024 - JB/NARA modified language and note based on DB's/SSA response in ERA Data Tool that it does not apply to all Capstone Officials.
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff annually at the end of the calendar year. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	Senior-level correspondence files captured at the Deputy Commissioner level or higher. (including all internal and external correspondence and any associated background materials): records consist of official correspondence (e.g. drafts, memoranda, letters, and similar communications, including but not limited to associated background materials originating in, or sent to, Senior-level officials. This correspondence deals with all substantive programmatic functions of the agency and can be addressed to or sent to both internal (e.g., Office of Commissioner, Deputy Commissioners, General Counsel, or the highest level office areas, etc.) or external (e.g. Members of Congress, etc.) to the agency. Note: Excluded are copies captured by all other Capstone Officials (not mentioned above), including copies maintained at the Associate Commissioner level.		Official Correspondence Files	These records consist of official copies of all correspondence and associated background materials originating in, or sent to, the Office of the Commissioner (including copies of incoming documents, comments, drafts, emails, etc.). This correspondence deals with the ongoing administrative and programmatic functions of the agency and can be addressed to, or sent from, sources both internal (e.g. , Deputy Commissioners, General Counsel, etc.) or external (e.g., Senators, Representatives, Governors, etc.) to the agency.	N1-047-10-003 / B	Permanent. Cut off records at the end of the fiscal year. Pre-accession individual electronic files to the National Archives 5 years after cut off. Legally transfer records in an acceptable format (following current CFR guidelines) to the National Archives annually, 10 years after cutoff.	Various components 3/13/2024 - JB/NARA modified language and note based on DB's/SSA response in ERA Data Tool that it does not apply to all Capstone Officials.
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff is annual; unless specified otherwise. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	These records consist of official correspondence (e.g., drafts, memoranda, letters, and similar communications, including but not limited to associated background materials originating in, or sent to, Senior-level Officials. This correspondence deals with all substantive programmatic functions of the agency and can be addressed to or sent from sources both internal (e.g., Deputy Commissioners, General Counsel, etc.) or external (e.g., Members of Congress, etc.) to the agency.		Bureau of Supplemental Security Income (BSSI) Bureau Director's Files - Official Correspondence Files	Official file copies of outgoing correspondence originating from the Office of the Bureau Director, BSSI. The correspondence is retained for its historical value.	NC1-047-76-17/2/A	Permanent. Transfer to the SSA Records Holding Area 2 years after the close of the calendar year in which dated, hold 3 years, and then transfer to the FRC. Offer to the National archives when 10 years old.	Office of Retirement and Disability Policy/Office of Income Security Programs
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff annually at the end of the calendar year. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	Agendas typically are Microsoft Word documents that list the topics covered in Executive Staff meetings and may identify component executives responsibility for addressing each topic. Agenda documents for Executive Staff meetings are attached to the Outlook Calendar invite.		Agendas of Executive Staff Meetings	N/A	New	Unscheduled - Proposed as PERMANENT	Multiple Components including Office of Communications

SSA Leadership Crosswalk

Bucket	Item	Series Title	Retention	Series Level Cut off Instructions, where applicable	Current Records Description	Series Title (New Item)	Superseded Series Title	Superseded Series Description	Superseded Authority	Superseded Retention	Office of Record (for Permanent items)
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff annually at the end of the calendar year. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	These records consist of minutes of meetings of executive staff, composed of the Commissioner, the Deputy Commissioner, and Deputy Commissioner-level personnel (e.g., Chief Information Officer, Chief Economist, General Counsel, etc.).		Minutes of Executive Staff Meetings	These records consist of minutes of meetings of the executive staff, composed of the Commissioner, the Deputy Commissioner, and Deputy Commissioner-level personnel (e.g., Chief Information Officer, Chief Economist, General Counsel, etc.).	N1-047-10-003 / C	Permanent. Cut off records at the end of the fiscal year. Pre-accession individual electronic files to the National Archives 5 years after cut off. Legally transfer records in an acceptable format (following current CFR guidelines) to the National Archives annually, 10 years after cut off.	Multiple Components
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff annually at the end of the calendar year. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	These logs reflect the assignment and disposition of incoming controlled correspondence and provides metadata (e.g., to, from, supplemental information, etc.).		Correspondence Control Logs	These logs reflect the assignment and disposition of incoming controlled correspondence.	N1-047-10-003 / D	Permanent. Cut off records at the end of the fiscal year. Pre-accession individual electronic files to the National Archives 5 years after cut off. Legally transfer records in an acceptable format (following current CFR guidelines) to the National Archives annually, 10 years after cut off.	Office of the Commissioner
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff annually at the end of the calendar year. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	With the exception of itineraries, calendars, appointment books, schedules of daily activities, and telephone logs have converted to electronic systems such as Microsoft Outlook Calendar and our agency's Voice-over-Internet Protocol telephone system. Itineraries are created typically as Microsoft Word documents when Senior-level Officials visit an agency office/s. The itinerary document lists the dates of a visit, identifies the location(s) to be visited and points of contact for the visit. The itinerary is attached to the Senior Official's Outlook Calendar invite for the visit.	Senior Official Calendars, Appointment Books, Itineraries, Schedules of Daily Activities and Telephone Logs	Senior Official Calendars, Appointment Books, Itineraries, Schedules of Daily Activities and Telephone Logs	N/A	New	Unscheduled - Proposed as PERMANENT	Various components
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff annually at the end of the calendar year. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	These files consist of records used to prepare briefings, addresses, lectures, and other presentations to be provided to, and/or given by senior officials regarding SSA programs, policies, or functions. These include books prepared daily, or on other regular schedules, to provide the executive leadership with the latest news and other important events and issues, or for upcoming meetings or trips. Included are copies of transcripts, charts, graphs, hand-outs, and similar materials.		Briefing Files Office of Record	These files consist of records used in briefings, speeches, lectures, and other presentations given by high echelon BHA officials regarding Bureau programs, policies, or functions. Included are copies of transcripts, charts, graphs, hand-outs, and similar materials.	NC-047-75-003 / 3/B/1	Permanent. Transfer to the Central Reference Unit after 5 years. Offer to the National Archives 10 years thereafter.	Office of Hearings and Operations/Office of Chief Administrative Law Judge (OCALJ); ORDP; and other components. See column K for additional information.
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff annually at the end of the calendar year. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	Speeches are a complete written narrative of the remarks delivered by a Senior Official, whereas talking points represent bulleted statements that serve as a reminder to the Senior Official of items to include or not to include in their delivered remarks.	Speeches, Talking Points, and Other Presentations by Senior Officials	Speeches, Talking Points, and Other Presentations by Senior Officials	N/A	New	Unscheduled - Proposed as PERMANENT	Various Components including the Office of Communications.

SSA Leadership Crosswalk

Bucket	Item	Series Title	Retention	Series Level Cut off Instructions, where applicable	Current Records Description	Series Title (New Item)	Superseded Series Title	Superseded Series Description	Superseded Authority	Superseded Retention	Office of Record (for Permanent items)
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff is annual; unless specified otherwise. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	These files consist of program delegations of continuing authority and revocations thereof. Included are approved program delegations having statutory basis in titles II, XVI, and XVIII of the Social Security Act, as amended, and title IV of the Federal Coal Mine Health and Safety Act of 1969, as amended, such as authority to certify benefit payments, authority to make Federal determinations of disability, authority to enter into agreements with states, authority to determine entitlement of individuals to benefits under title XVIII, etc.		Delegation of Authority Files - Record Copies of Approved Program Delegations of Authority	These files consist of program and administrative delegations of continuing authority and revocations thereof. Included are approved program delegations having statutory basis in titles II, XVI, and XVIII of the Social Security Act, as amended, and title IV of the Federal Coal Mine Health and Safety Act of 1969, as amended, such as authority to certify benefit payments, authority to make Federal determinations of disability, authority to enter into agreements with states, authority to determine entitlement of individuals to benefits under title XVIII, etc. Also included are approved administrative delegations of authority, such as authority to process adverse actions, authority to award contracts, authority to approve leave and overtime, printing, procurement, and recruitment authority, etc.	NC-047-75-007 / 5/B/1	Permanent. Place in an inactive file upon revocation or supersession. Cut off inactive file after 5 years and transfer to an FRC. Offer to the National Archives 20 years thereafter.	Various Components
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff is annual; unless specified otherwise. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	Biographical sketches, photographs, and similar documents concerning Senior-level Officials that are of a significant historic importance.		Official Biographies of Senior-level Officials	Biographical sketches, photographs, news clippings, and similar documents concerning high-level SSA officials.	NC-047-76-014 / 4/A	Permanent. Review file every 5 years. Remove biographies relating to separated employees and offer to the National Archives.	Office of Budget, Finance, and Management 3/13/2024 - Per JB/NARA - News Clippings are covered by GRS 6.4 item 030. 4/25/24 - added language "that are of a significant historic importance."
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff annually at the end of the calendar year.	Audiovisual recordings featuring the Commissioner and other high-level officials taken during internal and official mission related events, and/or events that are of a significant historic importance. EXCEPTION: Videos or audio recordings of mission-related meetings or conference proceedings that are transcribed. NARA prefers that the transcription be permanent, and the recording be temporary.	Mission-Related Non-Transcribed Audiovisual Recordings	Mission-Related Non-Transcribed Audiovisual Recordings	N/A	New	Unscheduled - Proposed as Permanent	OCOMM 4/25/24 - edited description to include: mission related events, and/or events that are of a significant historic importance.
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff annually at the end of the calendar year.	Transcriptions of audiovisual recordings featuring the Commissioner and other high-level officials taken during internal and external official events.	Mission-Related Transcriptions to Transcribed Audiovisual Recordings	Mission-Related Transcriptions to Transcribed Audiovisual Recordings	N/A	New	Unscheduled - Proposed as Permanent	OCOMM 12/7/23 - Column B showed as "0002" though should be "0001" for Permanent, so we changed.

SSA Leadership Crosswalk

Bucket	Item	Series Title	Retention	Series Level Cut off Instructions, where applicable	Current Records Description	Series Title (New Item)	Superseded Series Title	Superseded Series Description	Superseded Authority	Superseded Retention	Office of Record (for Permanent items)
Leadership Records	DAA-0047-2024-0001-0001	Executive Leadership Records	Permanent. Transfer records to NARA 15 years after cutoff.	Cutoff annually at the end of the calendar year.	Official portraits and other photographs featuring the Commissioner and other high-level officials taken during internal and official mission related events, and/or events that are of a significant historic importance.	Mission-Related Photographs (including official portraits)	Mission-Related Photographs (including official portraits)	N/A	New	Unscheduled - Proposed as Permanent	OCOMM 4/25/24 - OCOMM added criteria language "mission related events, and/or events that are of a significant historic importance." As NARA does not need photo just because it contains the COSS or "high-level" official.
TEMPORARY											
Leadership Records	DAA-0047-2024-0001-0002	Routine Leadership Records	Temporary.	Cutoff is annual at the end of the calendar year.	These records consist of record copies of formal decisions (e.g., hardship transfers, etc.) made by Senior-level Officials or by other executive personnel that does not meet NARA's criteria as "permanent".	Decisions in the Office of the Commissioner	Decisions in the Office of the Commissioner	N/A	New	Unscheduled - Proposed as Temporary	12/7/23 - Changed to ROUTINE 3/13/2024 - Per ERA Data Tool - remove SES selections and hiring allocations as those items are covered by GRS (2.1, 2.2 & 2.3).
Leadership Records	DAA-0047-2024-0001-0002	Routine Leadership Records	Temporary. Delete/destroy 10 years after cutoff unless prohibited by law, mandate, or business need.	Cutoff annually at the end of the calendar year.	These files consist of records used in briefings, speeches, lectures, and other presentations given by Senior-level officials regarding SSA programs, policies, or functions. Included are copies of transcripts, charts, graphs, hand-outs, and similar materials.		Briefing Files - Other Offices	These files consist of records used in briefings, speeches, lectures, and other presentations given by high echelon BHA officials regarding Bureau programs, policies, or functions. Included are copies of transcripts, charts, graphs, hand-outs, and similar materials.	NC-047-75-003 / 3/B/2	Temporary. Destroy after 2 years. Earlier disposal is authorized.	

SSA Leadership Crosswalk

Bucket	Item	Series Title	Retention	Series Level Cut off Instructions, where applicable	Current Records Description	Series Title (New Item)	Superseded Series Title	Superseded Series Description	Superseded Authority	Superseded Retention	Office of Record (for Permanent items)
Leadership Records	DAA-0047-2024-0001-0002	Routine Leadership Records	Temporary. Delete/destroy 25 years after cutoff unless prohibited by law, mandate, or business need.	Cutoff annually at the end of the calendar year.	Record Copies of Approved Administrative Delegations of Authority. included are approved administrative delegations of authority, such as authority to process adverse actions, authority to award contracts, authority to approve leave and overtime, printing, procurement, and recruitment, authority, etc.		Delegation of Authority Files - Record Copies of Approved Administrative Delegations of Authority	These files consist of program and administrative delegations of continuing authority and revocations thereof. Included are approved program delegations having statutory basis in titles II, XVI, and XVIII of the Social Security Act, as amended, and title IV of the Federal Coal Mine Health and Safety Act of 1969, as amended, such as authority to certify benefit payments, authority to make Federal determinations of disability, authority to enter into agreements with states, authority to determine entitlement of individuals to benefits under title XVIII, etc. Also included are approved administrative delegations of authority, such as authority to process adverse actions, authority to award contracts, authority to approve leave and overtime, printing, procurement, and recruitment authority, etc.	NC-047-75-007 / 5/B/2	Temporary. Place in an inactive file upon revocation or supersession. Cut off inactive file at the end of the calendar year and destroy 10 years thereafter.	
Leadership Records	DAA-0047-2024-0001-0002	Routine Leadership Records	Temporary. Delete/destroy 10 years after cutoff unless prohibited by law, mandate, or business need.	Cutoff annually at the end of the calendar year.	Biographical sketches, photographs, and similar documents concerning non-Capstone officials.		Biographies - Other Offices	Biographical sketches, photographs, news clippings, and similar documents concerning high-level SSA officials.	NC-047-76-014 / 4/B	Temporary. Destroy upon separation of the official or when purpose has been served, as appropriate.	3/13/2024 - per Jessica's comment in ERA Data Tool removed "news clippings" as they are covered by GRS 6.4, item 030.
Leadership Records	DAA-0047-2024-0001-0002	Routine Leadership Records	Temporary. Delete/destroy 10 years after cutoff unless prohibited by law, mandate, or business need.	Cutoff annually at the end of the calendar year.	Recordings of audiovisual meetings of Leadership who are not high-level officials, (e.g., Directors, Executive Officers, etc.) are temporary (NOTE: if transcribed the transcription is permanent).	Transcribed Audiovisual Recordings	Transcribed Audiovisual Recordings	N/A	New	Unscheduled - Proposed as Temporary	1/12/2023 - added language to description; 12/7/23 - Column B showed as "0003" though should be Temporary "0002", so
Leadership Records	DAA-0047-2024-0001-0002	Routine Leadership Records	OFFICE OF OCOMM PROPOSES TEMPORARY RETENTION not PERMANENT	Cutoff annually at the end of the calendar year. Committee and commission records should be cutoff at the end of the calendar year in which committee was dissolved.	Outward facing agency Blog and comments received, on topics such as agency goals, major public events, etc. on SSA.gov. Also includes responses to public comments and copied comments sent to another component.	Official Internal and External Social Media Posts by Senior Officials	Official Internal and External Social Media Posts by Senior Officials	N/A	New	Unscheduled - Proposed as TEMPORARY	OCCOMM is working with OGC to determine if COSS' Twitter account will post Unique content and if so, NARA would consider that SM account as PERMANENT. We are awaiting further instruction.