

<b>REQUEST FOR RECORDS DISPOSITION AUTHORITY</b>		JOB NUMBER <i>71-305-03-3</i>	
To: NATIONAL ARCHIVES & RECORDS ADMINISTRATION 8601 ADELPHI ROAD COLLEGE PARK, MD 20740-6001		Date received <i>6-2-2003</i>	
1. FROM (Agency or establishment) Bonneville Power Administration		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request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10.	
2. MAJOR SUBDIVISION Information Systems			
3. MINOR SUBDIVISION Information Services			
4. NAME OF PERSON WITH WHOM TO CONFER Mary Rose Kerg	5. TELEPHONE NUMBER 503-230-5456	DATE <i>10-6-03</i>	ARCHIVIST OF THE UNITED STATES <i>John W. Carl</i>
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 <u>2</u> page(s) are not needed now for the business for 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,  <input checked="" type="checkbox"/> is not required <input type="checkbox"/> is attached; or <input type="checkbox"/> has been requested.			
DATE May 22, 2003	SIGNATURE OF AGENCY REPRESENTATIVE <i>Mary Rose Kerg</i>		TITLE Records Officer
7. ITEM NO.	8. DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9. GRS OR SUPERSEDED JOB CITATION	10. ACTION TAKEN (NARA USE ONLY)
	Attachment 1  Please see attached two-page table with changes to the Supply chapter of the BPA Records Manual.  Attachment 2  The standard language about Electronic Mail and Word Processing System Copies as it appears in the final item in the Supply/Logistics/Procurement Services of the BPA Records Manual.  Attachment 3  Definition of "Active" and "Superseded/Obsolete" they pertain to Bonneville Power Administration business.  <i>cc: Agency, NR</i>		

## Changes to the Supply Chapter of the BPA Records Manual

Test	Existing Title and Description	NARA Job Number	Proposed Change	Justification
SU-14-15	<p><b>Material Disposal</b> Materials relating to the disposal of all excess material and equipment at BPA. Includes property disposed of through DOE, GSA sale (Standard Form 255a, and Standard Form 27), term contract, and donation (Standard Form 123).</p> <p>(a) Transactions of more than the Small Purchase limit.</p> <p><i>Retention Schedule:</i> <i>In Office: A+2 years.</i> <i>Records Storage 4 years.</i></p> <p>(b) Transactions of the Small Purchase limit or less.</p> <p><i>Retention Schedule:</i> <i>In Office: A+1 year. FRC 2 years.</i></p>	SF 115 NI-305-88-1 approved July 14, 1989	<p><b>Material Disposal</b> Materials relating to the disposal of all excess material and equipment at BPA. Includes property disposed of through DOE, GSA sale (Standard Form 114c) Sale of Government Property Negotiated Sales Contract, and Standard Form 122e, Transfer Order for Excess Personal Property), term contract, and donation (Standard Form 123).</p> <p><i>Retention Schedule</i></p> <p><i>In Office: Active + 2 years.</i> <i>BPA Records Storage: 4 years and then destroy.</i></p>	The client advised to apply the six-year retention schedule regardless if the transaction is more or less than the Small Purchase Limit.

## Changes to the Supply Chapter of the BPA Records Manual

Test	Existing Title and Description	NARA Job Number	Proposed Change	Justification
SU-15	<p><b>Quality Assurance</b> Material relating to BPA's Quality Assurance Program.</p> <p><i>Retention Schedule:</i></p> <p><i>Superseded</i></p>	SF 115 NI-305-88-1 approved July 14, 1989	<p><b>Quality Assurance (QA)</b> Material relating to BPA's Quality Assurance Policy, Program Guide, and related regulatory requirements. Defines Quality Assurance policy for TN in accordance with Department of Energy – Order (QA). Maintained by QA Process Manager.</p> <p><i>Retention Schedule:</i> <i>Retain while Active + 25 years and then review.</i></p>	Quality Assurance is a new function in the Transmission Business Line. The Manager determined that these records need to be kept 25 years after they come inactive.
SU-15-12	<p><b>BPA Specifications</b> Master copies of BPA material specifications. Case file by BPA specification number.</p> <p>Retention Schedule Superseded</p>	SF 115 NI 305-88-1 approved July 14, 1989	<p><b>BPA Specifications</b> Master copies maintained and filed by originating office. Case file by BPA specification number.</p> <p><i>Retention Schedule:</i> <i>Retain while active + 25 years and then destroy.</i></p>	The client determined that "Superseded" in this case was too vague. These specs are vital and need to be kept 25 years after they become inactive.

**FILE GUIDE AND RETENTION SCHEDULE:  
SUPPLY/LOGISTICS/PROCUREMENT SERVICES**

**Last Revision Date: January 15, 2003**

**FILE  
CODE**

**RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION**

**OFFICE OF  
RECORD/ORIGIN**

**Electronic Mail and Word Processing System Copies**

Electronic copies of records that are created on electronic systems and used solely to generate a recordkeeping copy of the records covered by the other items in this schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.

(a) Copies that have no further administrative value after the recordkeeping copy is made.

1. Copies maintained by individuals in personal files or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recordkeeping copy.

***Destroy/delete within 180 days after the recordkeeping copy has been produced.***

2. Copies maintained by individuals in personal electronic mail systems.

***Electronic mail will be destroyed automatically when 90 days old.***

- (b) Copies used for dissemination, revision, or updating that are maintained in addition to the recordkeeping copy.

***Destroy/delete when dissemination, revision, or updating is completed.***

See Section 800.8 in the BPA Records Manual for definitions of KEY terms.

A – Active

P – Permanent

S – Superseded/Obsolete

Z – Originating Office

**Office of Record/Origin: Generator or recipient responsible for retaining the record file.**

**BPA Records Storage at Headquarters for inactive records.**

**Federal Records Center (FRC) in Seattle: Off-site inactive records storage for Federal records.**

## Attachment 3

### BPA's definitions for "Active" and "Superseded/Obsolete"

#### A - Active:

- Current year (fiscal or calendar); or
- Life of equipment; or
- Period prior to final payment of a contract; or
- Period prior to close or final report of a case; or
- Period before completion of a project.
- On separation or transfer of employee.
- Until regularly scheduled audit occurs.
- Useful life of an engineering drawing.

#### S - Superseded/Obsolete:

- Material becomes outdated as related new material is developed; or
- New material replaces or revokes old material; or
- Material no longer of use or no longer needed by BPA; or
- Material about such issues as equipment, projects, and programs that are discontinued or canceled; or
- Material about outmoded equipment, technology or procedures; or
- Material about terminated committees or activities.