

<b>REQUEST FOR RECORDS DISPOSITION AUTHORITY</b>		JOB NUMBER <i>71-305-03-4</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		<b>NOTIFICATION TO AGENCY</b>  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request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10.	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>5/27/02</i>	ARCHIVIST OF THE UNITED STATES <i>Allen W. ...</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>16</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 23, 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 GRS OR SUPERSEDED JOB CITATION	10.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)
	The attached temporary records series are in the BPA Records Manual as new items. The attached are as follows:  ED-30, ED-31, and ED-32  EQ-26, EQ-26-11, EQ-26-12, and EQ-27  IR-11, IR-11-11, IR-11-12, IR-22-11, IR-27, IR-27-11, IR-28, IR-29, and IR-29-11.  TM-13, TM-14, TM-15, TM-16, TM-24, TM-25, TM-26, TM-27, TM-29, TM-30, TM-31, TM-32, TM-33, TM-34, TM-35, TM-36, and TM-38		
<i>SA 5/31/07 Copies sent to Agency, NR</i>			

FILE  
CODE

RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION

OFFICE OF  
RECORD/ORIGIN

**ED-30 Substation Structures and Foundations TNF**

Material relating to design and construction support of substation structures and foundations.

- ① a) Substation work.
- ② b) Seismic Design and Mitigation work.

**Retention Schedule:**

*In Office of Record: Active, and then destroy per phone conversation with Mary Rose Kerg 6/3/03*

**ED-31 Building Facilities Design and Construction Support TNF**

Material relating to design and construction support of building facilities and site utilities. See also MA-12-14, TLM Equipment and Materials.

- ③ a) Architectural work.
- ④ b) Engineering work.

**Retention Schedule:**

*In Office of Record: Active, and then destroy*

**ED-32 Structural Engineering, Analysis and Design TNF**

Material related to structural analysis and design of other facilities not covered by other file codes. See also MA-12-14, TLM Equipment and Materials.

- ⑤ a) Microwave Facilities – Towers work.
- ⑥ b) Access Road Bridge work.

**Retention Schedule:**

*In Office of Record: Active, and then destroy*

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 Storage (Headquarters) inactive storage Federal Records Center (FRC) (Seattle) off-site inactive records storage.

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 on 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.*

GRS 20  
Items 13+14

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.*

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**BPA Storage (Headquarters) inactive storage Federal Records Center (FRC) (Seattle) off-site inactive records storage.**

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-26	<p><b>Aquatic Nuisance Species (ANS)</b> Materials relating to development and implementation of policy and procedures for Aquatic Nuisance Species that threaten the diversity or abundance of native species and listed endangered species.</p> <p><i>Retention Schedule:</i> <b>PENDING NARA APPROVAL</b> <i>In Office:</i> Active + 2 years <i>Records Storage:</i> 4 years, then destroy.</p>	PGF
EQ-26-11	<p><b>ANS Passage Through Hydropower Plants</b> Documentation of the computer model, including development and operation, that evaluates the effect of options available and mitigation of invasive species at hydropower operations and other related stations.</p> <p><i>Retention Schedule:</i> <b>PENDING NARA APPROVAL</b> <i>In Office:</i> Active + 2 years <i>Records Storage:</i> 4 years, then destroy.</p>	PGF
EQ-26-12	<p><b>ANS Mitigation/Planning</b> BPA activities dealing with ANS mitigation, enhancement actions, identification and quantification of losses and the development of mitigation plans.</p> <p><i>Retention Schedule:</i> <b>PENDING NARA APPROVAL</b> <i>In Office:</i> Active + 2 years <i>Records Storage:</i> 4 years, then destroy.</p>	PGF
EQ-27	<p><b>Cultural Resource</b> Materials relating to cultural resource compliance for BPA projects, such as Transmission and Power projects, FCRPS program, Cultural Resource program, and Fish and Wild Life program.</p> <p><i>Retention Schedule:</i> <b>PENDING NARA APPROVAL</b> <i>In Office:</i> Active + 5 years <i>Records Storage:</i> 25 years and then destroy.</p>	KEC

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BPA Storage at Headquarters is inactive storage. Federal Records Center (FRC) in Seattle: off-site inactive storage.

FILE  
CODE

RECORDS SERIES, TITLE, DESCRIPTION, &amp; DISPOSITION

OFFICE OF  
RECORD/ORIGIN**Electronic Mail and Word Processing System Copies**

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GRS 20  
News 13+14

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
<b>IR</b>	<p><b>INFORMATION RESOURCES</b>  Material relating to the development and implementation of policy, standards, and procedures for information management activities. Includes material relating to system software and hardware, computer operations, telecommunications, office automation, and library services. In this Chapter, "ADP" means automated data processing. Data may be recorded on various media including paper, film, tape, disk, or diskette. The record is only on one medium, paper unless otherwise specified. Generally, only paper and microforms are accepted for storage to assure future access.</p> <p>Disposition: In accordance with instructions for specific material described by the following related subjects.</p>	
<b>IR-11</b>	<p><b>IT Program Direction</b>  Information that defines a strategic direction for implementation of business process automation objectives.</p>	<b>TI TIS</b>
<b>PENDING NARA APPROVAL</b>		
	<p><b>Retention Schedule:</b>  <i>In Office: Active + 5 years, and then destroy.</i></p>	
<b>IR-11-11</b>	<p><b>IT Policies and Guidelines</b>  Directives that serve to accomplish a consistent and uniform approach in establishing and managing a technology program throughout the business enterprise.</p>	<b>TI TIS</b>
<b>PENDING NARA APPROVAL</b>		
	<p><b>Retention Schedule:</b>  <i>In Office: 3 years or until expires. Records Storage: 7 years, and then destroy.</i></p>	
<b>IR-11-12</b>	<p><b>IT Standards and Procedures</b>  Information that sets the limiting parameters from within which the computing environment must be architected and managed.</p>	<b>TI TIS</b>
<b>PENDING NARA APPROVAL</b>		
	<p><b>Retention Schedule:</b>  <i>In Office: 3 years or until expires. Records Storage: 7 years and then destroy.</i></p>	

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
IR-22-11	<b>TBL Resource Proposals</b> TBL requests for computer-related hardware or software. <b>PENDING NARA APPROVAL</b>	TI TIS
	<i>Retention Schedule:</i> <i>In Office: Active + 2 years, and then destroy.</i>	
IR-27	<b>Data Resource Management</b> Material relating to the development and implementation of policy, standards, and procedures for data resource management activities. <b>PENDING NARA APPROVAL</b>	TI TIS
	<i>Retention Schedule:</i> <i>In Office: Retain until Superseded. BPA Records Storage: 3 years, and then destroy.</i>	
IR-27-11	<b>Electronic Data</b> Data and database backups taken at upgrade occurrences.	TI TIS
	<b>PENDING NARA APPROVAL</b> <i>Retention Schedule:</i> <i>In Office: 1 year Records Storage: 30 years, and then destroy.</i>	
IR-28	<b>Hardware Lifecycle and Maintenance</b> All material relating to the functionality, evaluation, and use of hardware devices, its associated components, as related to functional requirements, purchase, installation, maintenance, and use.	TI TIS
	<b>PENDING NARA APPROVAL</b> <i>Retention Schedule:</i> <i>In Office: Active + 2 years, and then destroy.</i> <i>(Active is while inventory exists)</i>	
IR-29	<b>Commercial Software</b> All material relating to the functionality, evaluation, and use of Commercial Off-the-Shelf ADP software. Material relating to the justification, functional requirements, installation, maintenance, and use of Commercial Off-the-Shelf ADP software. Includes material relating to the customization or enhancements of automated systems.	TI TIS
	<b>PENDING NARA APPROVAL</b> <i>Retention Schedule:</i> <i>In Office: Active + 2 years Records Storage: 3 years, and then destroy.</i>	

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

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

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
IR-29-11	<b>License and Maintenance Agreements (Commercial Software)</b> License and maintenance agreements and other associated material relating to initial purchase, subsequent patches and upgrades, and intermediate and final disposal of the media.	<b>CP</b> <b>DI</b> <b>TI</b> <b>TIS</b>

**PENDING NARA APPROVAL**

15 **Retention Schedule:**  
*In Office: Active + 2 years and then destroy.*  
*(Active means before disposal of items.)*



FILE  
CODE

RECORDS SERIES, TITLE, DESCRIPTION, &amp; DISPOSITION

OFFICE OF  
RECORD/ORIGIN**Electronic Mail and Word Processing System Copies**

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

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

GRS 20  
Items 13+14

*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.*

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**FILE GUIDE AND RETENTION SCHEDULE:  
TRANSMISSION MARKETING AND SALES**

**Last Revision Date: May 9, 2003**

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
TM-13	<p><b>Fiber Optics (Contracts)</b> Fiber Optics Contracts (including License Agreement) depict fiber optic network route agreements with various outside telecom carriers for dark fiber and other rights-of-way sources.</p>	TMC
	<p>⑬ <i>Retention Schedule: PENDING NARA APPROVAL</i> <i>Retain for life of contract plus 6 years, and then destroy.</i></p>	
TM-14	<p><b>Personal Communications Systems (Contracts)</b> Wireless and Personal Communications Systems (PCS) agreements (including License Agreement) which describe personal communications systems that are frequency driven by facilities such as BPA's high microwave towers and transmission line structures that give signals that required range. Handsets can combine paper, fax, telephone and data communications and may plug directly into the computers.</p>	TMC
	<p>⑭ <i>Retention Schedule: PENDING NARA APPROVAL</i> <i>Retain for life of contract plus 6 years, and then destroy.</i></p>	
TM-15	<p><b>Open Access Service Agreements</b> Open Access Same Time Information System Agreements that incorporate an information network developed by the electric industry in response to FERC policy on transmission access, is intended to provide information and processes necessary for non-discriminatory access to electric transmission systems.</p>	TMC
	<p>⑮ <i>Retention Schedule: PENDING NARA APPROVAL</i> <i>Retain for life of contract plus 6 years, and then destroy.</i></p>	
TM-16	<p><b>Contracts/Operations and Maintenance Agreements Relating to Construction of Transmission Lines and/or Substations</b> Material relating to the contract portion of the construction of transmission lines and/or substations, including operations and maintenance agreements.</p>	TMC TOC
	<p>⑯ <i>Retention Schedule: PENDING NARA APPROVAL</i> <i>Retain for life of contract plus 6 years, and then destroy.</i></p>	

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
TM-24	<b>Open Access Same Time Information System (OASIS) Administration</b> <b>PENDING NARA APPROVAL</b>	<i>documentation only per phone conversation with Mary Rose Kerg 6/3/03 TMS</i>
V I T A L	Recordkeeping copy: Electronic a. FERC required OASIS postings on Total Transfer Capability (TTC) and Available Transfer Capability (ATC) values.	
	<i>(20) Retention Schedule: In Office: 3 years 3 months and then destroy per phone conversation with Mary Rose Kerg, 6/3/03</i>	
	Electronic files available on line for 90 days, then stored on back-up electronic tape for 3 years.	
V I T A L	b. FERC required OASIS information, including that on requested transmission products, reservations and ancillary services and Capacity Benefit Margin (CBM) information.	
	<i>(21) Retention Schedule: In Office: 3 years 3 months, and then destroy</i>	
	Available on line for 90 days, then stored on back-up electronic tape for 3 years.	
V I T A L	c. FERC required OASIS electronic postings, including personnel transfers between business lines, standards of conduct (SOC) issues, [tariff deviations, emergency situations which may impact SOC], list of system studies, OASIS host information, and OASIS access security information.	
	<i>(22) Retention Schedule: In Office: 3 years 3 months, and then destroy</i>	
	Electronic files available on line for 90 days, then stored on electronic tape for an additional 3 years.	

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
<b>TM-25</b>	<p><b>External Professional Organizations</b> Western Systems Coordinating Council (WSCC), Federal Energy Regulatory Commission (FERC), North American Reliability Council (NERC), Northwest Regional Transmission Association (NRTA), Western Regional Transmission Association (WRTA), and Northwest Power Pool (NWPP). Includes documentation for complying with WSCC guidelines. Standards and regulations, specific policies impacting transmission scheduling, and including correspondence, FERC Orders, filings, comments, meeting notices and other documentation from such organizations relative to specific transmission scheduling. <b>Note: Transmission Contracts are NOT included under this file code.</b></p> <p><i>23</i> <b>Retention Schedule: PENDING NARA APPROVAL</b> <b>In Office: 4 years, and then destroy.</b></p> <p>Electronic Files available on line for 2 years, then stored on computer disk for 2 years.</p>	<b>TMS</b>
<b>TM-26</b>	<p><b>Real-Time Transmission Scheduling</b> All documentation directly pertaining to the verification and delivery process of transmission products scheduling. Documentation includes real-time load sheets, and transmission schedulers' load logs and may include other documentation deemed necessary for archiving by the Real-time Manager.</p> <p><i>24</i> <b>Retention Schedule: PENDING NARA APPROVAL</b> <b>In Office: Active Records Storage: 7 years, and then destroy.</b></p>	<b>TMS</b>
<b>TM-27</b>	<p><b>Transmission Pre-Scheduling</b> All documents directly pertaining to the Northwest (NW) and Southwest (SW) transmission pre-scheduling function, including electronic tags and pre-schedule faxed data from customers.</p> <p><i>25</i> <b>Retention Schedule: PENDING NARA APPROVAL</b> <b>In Office: Active Records Storage: 7 years, and then destroy.</b></p>	<b>TMS</b>

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**FILE GUIDE AND RETENTION SCHEDULE:  
TRANSMISSION MARKETING AND SALES**

Last Revision Date: May 9, 2003

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
<b>TM-29</b>	<b>Capacity Allocations</b> Documentation of Transmission Contract Holder by constrained path.	<b>TMS</b>
	<p>(26) <i>Retention Schedule: PENDING NARA APPROVAL</i> <i>In Office: Active Records Storage: 7 years, and then destroy.</i></p>	
<b>TM-30</b>	<b>Scheduling Centers</b> General information related to Transmission Scheduling Centers.	<b>TMS</b>
	<p>(27) <i>Retention Schedule: PENDING NARA APPROVAL</i> <i>Recordkeeping copy: Paper. Destroy when one year old.</i></p>	
<b>TM-31</b>	<b>After-the-Fact (ATF)</b> Documentation relative to requests and establishment of specific accounts for the purpose of tracking commercial transmission transactions, and resolution and settlement of ATF control area and customer accounting issues, including correspondence with customers, and various ATF reports.	<b>TMS</b>
	<p>(28) <i>Retention Schedule: PENDING NARA APPROVAL</i> <i>In Office: Active Records Storage: 10 years, and then destroy.</i></p>	
<b>TM-32</b>	<b>Transmission Policy and Business Practices</b> Transmission policies and business practices that have originated and/or have been implemented in TMS, and which facilitate daily operations of Transmission Supply. This includes policies impacting reservations, pre-schedule, and real-time functions.	<b>TMS</b>
	<p><i>Retention Schedule: PENDING NARA APPROVAL</i></p> <p>a. <i>Recordkeeping copy: Paper. Destroy when superseded or when six years old, whichever is later.</i></p> <p>b. <i>Electronic recordkeeping copy. Store on line for one year, then scan to a compact disk and retain for an additional five years or until business practice and/or policy is superseded.</i></p>	

N1-305-05-1

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
TM-33	<b>Customer Service</b> Transmission Supply documentation on specific customer issues.	TMS
	<i>Retention Schedule: PENDING NARA APPROVAL</i> a. <i>Recordkeeping copy: Paper. Destroy when six years old.</i> b. <i>Electronic recordkeeping copy. Store on line for one year, then scan to a compact disk and retain for an additional five years.</i>	
TM-34	<b>Short-Term Contract Management</b> Open Access Same Time Information System (OASIS) contract requests with a contract term of less than one year between Bonneville Power Administration Transmission and eligible customers.	TMS
	<i>Retention Schedule: PENDING NARA APPROVAL</i> <i>Recordkeeping copy: Electronic. Store on line for one year, then download to a compact disk and retain for an additional 6 years.</i>	
TM-35	<b>Load and Resource Forecasts</b> Forecasts of loads and resources used for Available Transfer Capability (ATC) calculations and load/resource balance within the BPA control area. This includes correspondence and policies related to these forecasts and their implementation.	TMC
	<i>Retention Schedule: PENDING NARA APPROVAL</i> <i>Recordkeeping copy: Electronic. Destroy when 15 years old.</i>	
TM-36	<b>Capacity Coordination</b> Documentation of the capacity on constrained paths including California/Oregon Intertie (COI), Pacific Direct Current Intertie (PDCI), Northern Intertie (NI), Montana Power Company (MPC), West of Hawaii (WOH), LaGrande, and Reno-Alturas.	TMS TOD
	<i>Retention Schedule: PENDING NARA APPROVAL</i> <i>Recordkeeping copy: Paper. Destroy when 5 years old.</i>	

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
<b>TM-38</b>	<p><b>Voice Recordings of Transmission Supply Reservations, Pre-schedule, and Real-time</b> Voice recordings of Transmission Supply main functions, including Reservations, Pre-schedule, Real-time, and After-the-Fact business transactions and issue resolution with customers.</p>	<b>TMS TOH</b>
	<p><b>(34) Retention Schedule: PENDING NARA APPROVAL</b> <b>Recordkeeping copy: Electronic. Destroy when 7 years old.</b></p>	

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FILE  
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RECORDS SERIES, TITLE, DESCRIPTION, &amp; DISPOSITION

OFFICE OF  
RECORD/ORIGIN

**Electronic Mail and Word Processing System Copies**

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## 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.