INACTIVE - ALL ITEMS SUPERSEDED OR OBSOLETE

Schedule Number: N1-305-88-001

All items in this schedule are inactive. Items are either obsolete or have been superseded by newer NARA approved records schedules.

Description:

The SF-115 cover page for N1-305-07-001 states, "This schedule supersedes all existing BPA schedules and cancels all pending BPA schedule jobs currently with the National Archives and Records Administration. All the existing 1153 items in the BPA retention manual are cross walked to the new large aggregation schedule and the crosswalk is attached." Use the agency manual numbers in the N1-305-07-001 crosswalk to identify the new item superseding items in this schedule.

Date Reported: 11/01/2022 N1-305-88-001

		•	
REQUEST FOR RECORDS DISPOSITION AUTHORITY		VE BLANK	
(See Instructions on reverse)	N1-305	5-88-1	· · ·
GENERAL SERVICES ADMINISTRATION NATIONAL ARCHIVES AND RECORDS SERVICE, WASHINGTON, DC 20408	DATE RECEIVED	7/27/88	
FROM (Agency or establishment)	NOTIFICA	TION TO AGEN	CY
Department of Energy	In accordance with the the disposal request, in	icluding amendm	ents, is approved
Bonneville Power Administration	except for items that approved" or "withdra	wn" in column	10. If no records
, MINOR SUBDIVISION	are proposed for dispos	al, the signature o	of the Archivist is
NAME OF PERSON WITH WHOM TO CONFER 5. TELEPHONE EXT.	DATE ARCHI	VIST OF THE UI	NITED STATES
Janice Schmidt /BPA FTS 429-4072	9/14/14/	andere (leelu
CERTIFICATE OF AGENCY REPRESENTATIVE	1901	0	
hereby certify that I am authorized to act for this agency in matters pertained that the records proposed for disposal in this Request of page(stagency or will not be needed after the retention periods specified; and accounting Office, if required under the provisions of Title 8 of the GAO attached. A. GAO concurrence: is attached; or is unnecessary.) are not now need that written concu	ed for the bu irrence from	siness of this the`General
			F*
D. TITLE			
	epartmental Rec	ords Offic	er '''
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 GRS OR SUPERSEDED JOB CITATION	10.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)
The attached Bonneville Power Administration manual consisting of 10 parts, of which part	800, made		9'
up of the records schedules, is submitted for	aisposition		
approval.			
Department of Energy concurs with BPA's recom	mendation.		
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U	BUDGET		- See Dispo	eition -	 -	A+lyr
	Material relating to the development, presentation, and approval of BPA's yearly budget; analyses of funding and resource issues; administration and oversight of funding allocations and use of fiscal and human resources. Data may be recorded on various media including paper, film, tape, disk, or diskette, unless otherwise specified in the narrative disposition.		e e	1 ,		
	Disposition: In accordance with instructions for specific material described by the following related subjects.					
U-11	BPA Budget Formulation Material relating to the development of BPA's planning year, budget year, and outyear budgets. See also BU-13, Operating Year Resources.	DRB	2yrs	N.		2yrs
	AUTHORIZATION: GRS 5/3					
J-11-15	BPA Budget and RPAs					1
	(a) The BPA Budget Instructions and the Internal Budget reports that back up the BPA Budget. Approximately 15 linear inches retained in chronological order by fiscal year with an annual accumulation of 1 linear inch. Offer to NARA in annual segments when 25 years old.	DRB	10yrs	15yrs	P	A+lyr
	AUTHORIZATION: BPA Records Schedule & Files Handbook BU-1			1	1	1

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See Sectich 8008 for explanation of KEY terms.

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(b) Ma	erial relating to the preparation, analysis,	DRB	Atlyr	5yre		A+lvr
present	tion, and approval of BPA's Budget, Budget Review, and documentations of budget decisions.		•		:	
AUTHORI	ATION: GRS 5/4					
documen signifi	uests for Program/Project Authorization (RPAs) are s that communicate proposed programs/projects or ant changes in previously approved programs/projects gement approval.	DRB	A+lyr	5yrs		A+lyr
<u>AUTHORI</u>	ATION: GRS 5/4	·				
Materia staffin System	MURS Systems Reports relating to BPA's full time equivalent (PTE) and the DOE's Manpower Utilization and Reporting MURS) Comprehensive Report. See also MN-12, Management.	DRB	A+lyr	5yrs		A+lyr
AUTHORI	ATION: GRS 5/2(b)					
DOE Bud	<u>et</u>					
passbac	DOE Budget Instructions, DOE Budget document, , and appeals documents. Approximately 4 linear etained in chronological order by fiscal year with	DRB	10 yrs	15yrs	P	Atlyr
DOE Bud (a) The	et DOE Budget Instructions, DOE Budget document,	DRB	10	yrs	yrs 15yrs	yrs 15yrs P

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1-17	an annual accumulation of 1 linear inch. Offer to NARA in						
cont.)	annual segments when 25 years old.						
	AUTHORIZATION: BPA Records Schedule & Files Handbook BU-1					,	
. ~	(b) Material relating to the preparation and presentation of BPA's budget for formal documentation to the DOE, the	DRB	A+lyr	5yrs		A+lyr	
	DOE hearings, and the DOE passback and appeals.						
	AUTHORIZATION: GRS 5/4						
j-11-18 "	OMB Budget			·			
	(a) The OMB Budget Instructions, OMB Budget decument, passback, and appeals document. Approximately 5 linear inches retained in chronological order by fiscal year	DRB	10yrs	15yrs.;	P	A+lyr	
	with an annual accumulation of 1 linear inch. Offer to NARA in annual segments when 25 years old.					·	
	AUTHORIZATION: BPA Records Schedule & Files Handbook BU-1					į	
	(b) Material relating to the preparation and presentation of BPA's budget for formal documentation to the OMB, the OMB Document Plat Book, the OMB hearings, and the OMB	DRB	lyr	5yrs		A+lyr	
	passback and appeals.						
	AUTHORIZATION: GR6 5/4				-	1	
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		11200112	OFFICE	BPA	FRC	OFFICE	
BU-11-19	- Congressional Budget						
			·	1			
	(a) The Congressional Budget Instructions, Congressional	DRB	10yrs	15yrs	P	A+lyr	
~	Budget documents, and Appropriation Subcommittee reports.			,	1		
	Approximately 6 linear inches retained in chronological						
	order by fiscal year with an annual accumulation of 1 linear			1			
]	inch. Offer to NARA in annual segments when 25 years old.			1			
	,	[[
	AUTHORIZATION: BPA Records Schedule & Files Handbook BU-1						
	(b) Material relating to the preparation and presentation	DRB	A+lyr	5yrs		A+lyr	
	of BPA's budget for formal documentation to the Congress,			-7		1	
•	the Congressional Document Plat Book, the Congressional						
·	hearings, and Congressional report language.						
	meaningly and congressional report ranguages				ŀ		
	AUTHORIZATION: GRS 5/4	├					
			_				
BU-13	Operating Year Resources	DRB	2yrs	1	ĺ	2yrs	
	Material relating to the administration and oversight of			1].	
	BPA's operating year budget through the allotment of funds	1				1	
	and the monitoring and analysis of the use of fiscal and			`		1	
<u>'</u>	human resources.					1	
· · · · · · · · · · · · · · · · · · ·	AUTHORIZATION: CRS 5/3	↓		-		<u> </u>	
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See Section 800 8 for explanation of KEY-terms.

BPA RECORDS MANUAL

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	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	OFFICE	BPA	FRC	OFFICE
- OMB Apportionment	DRB	-5yro	ļ		A+1yr
Material relating to the distribution made by the OMB of amounts available for obligation in the BPA Fund account into amounts available for specified periods, activities, projects or combinations thereof. The amounts so apportioned are limits for the stated period.					
AUTHORIZATION: GRS 5/5(a)					
DOE Allotment Material relating to the "advice of allotment" from DOE. An "advice of allotment" is a Departmental transaction which transfers the OMB apportionment to BPA in the form of an obligational authority. BPA then allocates among its programs and other activities.	DRB	5yrs			A+lyr
AUTHORIZATION: GRS 5/5(a)					
BPA Allocations Material relating to allocations issued to Assistant Administrators for their Offices, authorizing them to incur obligations for their programs.	DRB	5yrs			A+lyr
AUTHORIZATION: CRS 5/5(a)	-				
					,
	amounts available for obligation in the BPA Fund account into amounts available for specified periods, activities, projects or combinations thereof. The amounts so apportioned are limits for the stated period. AUTHORIZATION: GRS 5/5(a) DOE Allotment Material relating to the "advice of allotment" from DOE. An "advice of allotment" is a Departmental transaction which transfers the OMB apportionment to BPA in the form of an obligational authority. BPA then allocates among its programs and other activities. AUTHORIZATION: GRS 5/5(a) BPA Allocations Material relating to allocations issued to Assistant Administrators for their Offices, authorizing them to incur obligations for their programs.	amounts available for obligation in the BPA Fund account into amounts available for specified periods, activities, projects or combinations thereof. The amounts so apportioned are limits for the stated period. AUTHORIZATION: GRS 5/5(a) DOE Allotment Material relating to the "advice of allotment" from DOE. An "advice of allotment" is a Departmental transaction which transfers the OMB apportionment to BPA in the form of an obligational authority. BPA then allocates among its programs and other activities. AUTHORIZATION: GRS 5/5(a) BPA Allocations Material relating to allocations issued to Assistant Administrators for their Offices, authorizing them to incur obligations for their programs.	amounts available for obligation in the BPA Fund account into amounts available for specified periods, activities, projects or combinations thereof. The amounts so apportioned are limits for the stated period. AUTHORIZATION: GRS 5/5(a) DOE Allotment Material relating to the "advice of allotment" from DOE. An "advice of allotment" is a Departmental transaction which transfers the OMB apportionment to BPA in the form of an obligational authority. BPA then allocates among its programs and other activities. AUTHORIZATION: GRS 5/5(a) BPA Allocations Material relating to allocations issued to Assistant Administrators for their Offices, authorizing them to incur obligations for their programs.	amounts available for obligation in the BPA Fund account into amounts available for specified periods, activities, projects or combinations thereof. The amounts so apportioned are limits for the stated period. AUTHORIZATION: GRS 5/5(a) DOB Allotment Material relating to the "advice of allotment" from DOE. An "advice of allotment" is a Departmental transaction which transfers the OMB apportionment to BPA in the form of an obligational authority. BPA then allocates among its programs and other activities. AUTHORIZATION: GRS 5/5(a) BPA Allocations Material relating to allocations issued to Assistant Administrators for their Offices, authorizing them to incur obligations for their programs.	amounts available for obligation in the BPA Pund account into amounts available for specified periods, activities, projects or combinations thereof. The amounts so apportioned are limits for the stated period. AUTHORIZATION: GRS \$/5(a) DOB Allotment Material relating to the "advice of allotment" from DOB. An "advice of allotment" is a Departmental transaction which transfers the OMB apportionment to BPA in the form of an obligational authority. BPA then allocates among its programs and other activities. AUTHORIZATION: GRS 5/5(a) BPA Allocations Material relating to allocations issued to Assistant Administrators for their Offices, authorizing them to incur obligations for their programs.

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See Section 800 8 for explanation of KEY terms

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3U-13-14	Operating Year Plans	DRB	2yrs			2yrs
	Material relating to the preparation, presentation, and management of decisions and agreements about the Offices' resource-related Annual Plans and the Start-of-Year (SOY) Plans.					
·	AUTHORIZATION: BPA Records Schedule & Piles Handbook BU-5		·			
90-13-15	Outlays Material relating to BPA's outlays, receipts and net outlays. For budget purposes, outlays include both cash and non-cash (such as net billing) transactions.	DRB	2yrs			2yrs
	AUTHORIZATION: GRS 5/3					
8U-13-16	Reception and Representation Fund Material relating to expenses authorized under this fund expressly for and by BPA's Administrator.	DRB .	2yrs			2yrs
	AUTHORISATION: GRG 5/3	·	A. L			
8U-14	Program Resource Requirements Material relating to the fiscal and human resource	DRB	λ+2yrs			A+lyr
· ·	requirements and related issues for accomplishing and maintaining BPA's programs.	,		PENDII	AC.	
	AUTHORIZATION: Recommendation of Management				74	l l

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14-11	Capital Equipment Resource Requirements Material relating to resource requirements for and related issues on purchase of capitalized equipment that supports all BPA programs. Includes automated data processing (ADP) general purpose equipment costing \$1,000 and greater; office furniture and equipment; and all BPA-developed ADP application software of \$100,000 and greater capitalizable nature.	DRB	A+2yrs	PENDI	VG.	A+lyr	
. •	AUTHORIZATION: Recommendation of Management						
3-14-12	Energy Conservation Resource Requirements Material relating to resource requirements for and related issues on BPA's Energy Conservation Program. Includes home energy efficiency, commercial energy efficiency, street lighting, utility distribution system loss reduction, industrial technological transfers, passive solar energy	DRB	A+2yrs			A+lyr	
	applications and conservation measures for new home and commercial building construction. AUTHORIZATION: Recommendation of Management			PENDI	C		
J-14-13	Fish and Wildlife Resource Requirements Material relating to resource requirements for and related issues on protection, mitigation, and enhancement of fish and wildlife affected by hydroelectric facilities on the	DRB	A+2yrs			A+lyr	

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SU-14-13	Columbia River and its tributaries, in accordance with the							
(cont.)	Pacific Northwest Power Act.		•	-				
				AFVIIII	MI.			
,	AUTHORIZATION: Recommendation of Management			ILIVII	NU	1		
						1		
3U-14-14	General and Administrative Resource Requirements	DRB	A+2yrs			A+lyr		
	Material relating to resource requirements for and					ł		
	related issues on BPA's executive management, financial							
	control, regulatory compliance, accounting, and			,		1		
	administrative services.	·		nruni	NU			
	- umuonaantou - Daraman Jahlan of Managamanh			PENDI	Niv			
	AUTHORIZATION: Recommendation of Management				7**	1		
BU-14-15	Associated Agencies' Resource Requirements	DRB	A+2yrs			A+lyr		
	Material relating to resource requirements for and related		•			_		
	issues on BPA's payments to the U.S. Treasury on							
,	borrowings to finance BPA's construction, energy							
	conservation, and fish and wildlife programs. Also,							
.	material relating to repayment of the operation and	-						
	maintenance (O&M) costs of thirty U.S. Army Corps of			,				
	Engineers and U.S. Bureau of Reclamation power generating			·				
	projects; O&M of Lower Snake River Compensation Plan							
	Hatcheries; interest and amortization on the U.S. Bureau of Reclamation and U.S. Army Corps of Engineers capital			¶.				
	investments in power generating facilities; and							
	coordination agreement payments to the Federal Energy							
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4-15	Regulatory Commission (FERC). See also FI-21-12(c),					1		
cont.)	Treasury Borrowing/Investing.			MEMBI	NU			
				PENDI	NI			
	AUTHORIZATION: Recommendation of Management			4 FILE	110	1		
				.		1		
U-14-16 . U-14-16	Planning Council Resource Requirements	DRB	A+2yrs			A+lyr		
	Material relating to resource requirements for and related	1	_			_		
	issues on activities of the Pacific Northwest Electric							
	Power and Conservation Planning Council required by the					1		
	Pacific Northwest Power Act.			AFRICA	10	1		
				PENDI	NI.			
	AUTHORIZATION: Recommendation of Management			ILIIVI	NV .			
,					<u> </u>			
U-14-17	Power Marketing Resource Requirements	DRB	A+2yrs			A+lyr		
	Material relating to resource requirements for and related		-			_		
	issues on forecasting regional demand; negotiating power							
	sales and wheeling, billing, and servicing these contracts;					1		
	reviewing and establishing wholesale power and wheeling			1				
<u> </u>	rates; and encouraging public participation in the							
	formation of BPA policies and programs.		*	ACHDI	NO			
				PENDI	NE	1		
	AUTHORIZATION: Recommendation of Management			I PIIDI	110			
	•			1		•		
U-14-18	Power Scheduling Resource Requirements	DRB	A+2yrs			A+lyr		
	Material relating to resource requirements for and related	[
	issues on scheduling of power.		•			1		
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ļ	<u>AUTHORIZATION</u> : Recommendation of Management			KENUI	Ni			
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3U-14-19	Reimbursable Resource Requirements Material relating to resource requirements for and issues related to reimbursable power purchases and reimbursable services such as construction, operation, and maintenance of transmission facilities and related utility and general support for customers and other entities.	DRB	A+2yrs	PENDI	NG.	A+lyr	
0U-14-20	AUTHORIZATION: Recommendation of Management Residential Exchange Resource Requirements Material relating to resource requirements for and related issues on extending the benefits of low-cost Federal power to the residential and small farm customers of investor-owned and publicly-owned utilities, in accordance with the Pacific Northwest Power Act. AUTHORIZATION: Recommendation of Management	DRB	A+2yrs	PENDI		A+lyr	
U-14-21	Acquisition Resource Requirements Material relating to resource requirements for and related issues on the orderly planning, acquisition, and oversight of resources, including resources purchased prior passage of the Pacific Northwest Power Act. AUTHORIZATION: Recommendation of Management	DRB	A+2yrs.	PENDI	VC	A+lyr	

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			OFFICE	BPA	FRC	OFFICE	
4-22	Support Services Resource Requirements Material relating to resource requirements for and related issues on BPA's goods and services. Includes aircraft services; procurement services; vehicle maintenance; laboratory services; tool and equipment purchase, use, and repair; general shop services; GSA rents; and expense activities related to central automatic data processing (ADP) services and operations.	DRB	A+2yrs	PENDIN	G	A+lyr	
***	AUTHORIZATION: Recommendation of Management						
BU-14-23	System Maintenance Resource Requirements Material relating to resource requirements for and related issues on maintaining the facilities and equipment of BPA's transmission system.	DRB	A+2yrs	1'		A+lyr	
	<u>AUTHORIZATION</u> : Recommendation of Management			PENDI	VG		
BU-14-24	System Operations Resource Requirements Material relating to resource requirements for and related issues on operating the transmission lines and substations of BPA's transmission system.	DRB	A+2yrs			A+lyr	
	AUTHORIZATION: Recommendation of Management		P	ENDING			
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See Section 800 8 for explanation of KEY terms

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3U-14-25	System Planning and Construction Resource Requirements Material relating to resource requirements for and related issues on the continuation of construction work on transmission lines, substations and related facilities initiated in prior years; initiation of construction of system additions; and planning, research, and development	DRB	A+2yrs		,	A+lyr
	for a reliable, efficient, and cost-effective regional transmission system.			PENDIN	G	
	<u>AUTHORIZATION</u> : Recommendation of Management		•	A MT		
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See Section 800 8 for explanation of KEY terms.

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AFILE GUIDE AND RETENTION SCHEDULE

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		I LOOND	OFFICE	BPA	FAC	OFFICE
	CONSERVATION Material relating to the development, implementation, and management of energy conservation programs and activities. Data may be recorded on various media including paper, film, tape, disk, or diskette, unless otherwise specified in the narrative disposition. Disposition: In accordance with instructions for specific material described by the following related subjects.		See Dispos	sition		A+lyr
N-11	Conservation Marketing Material relating to marketing studies, research, and firms' qualifications. See also FI-11-12, Conservation Accounting, and SU-12, Routine Procurement Files. AUTHORIZATION: Recommendation of Management	R xCB	A+lyr	^{2yrs}	NG	A+lyr
. 2	Conservation Programs Programs that offer financial incentives to utilities and consumers for measures that make the generation, transmission, and end-use of electricity more efficient; or that displace electricity consumption with renewable resources. Case file alphabetically by name of program. See also FI-11-12, Conservation Accounting, and SU-12, Routine Procurement Files. AUTHORIZATION: Recommendation of Management	R xCB	A+lyr	^{2yrs}	NG	A+lyr

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N-13	Agricultural Sector	R	λ+lyr `	2yrs		A+lyr
	Activities, evaluations, and strategies general to all or	хСВ				1
	several conservation issues or programs in the agricultural		•	BENDL	lin.	
	area; includes lost opportunities.			PENDI		
				FILE	w	, •
	AUTHORIZATION: Recommendation of Management					
N-14	Commercial Sector	R	A+lyr	2yrs		A+lyr
	Activities, evaluations, and strategies general to all or	хСВ				
	several conservation issues or programs in the commercial				,	
•	area; includes lost opportunities.			CHIDI	in	
,	••			PHNIII	Ni	1
	AUTHORIZATION: Recommendation of Management			ILIIDI	100	
,						
N-15	Industrial Sector	R	A+lyr	2yrs		A+lyr
	Activities, evaluations, and strategies general to all or	хCВ				
	several conservation issues or programs in the industrial		,	DEMINI	MO	
	area; includes lost opportunities.			PENDI	Ni	
	AUTHORIZATION: Recommendation of Management	-		LIN	114	
	AUTHORIZATION: Recommendation of Hanagement					
N-16	Residential Sector	R	A+lyr	2yrs		A+lyr
10	Activities, evaluations, and strategies general to all or	хСВ				
	several conservation issues or programs in the residential			-		
•	area; includes lost opportunities.					
				DENIII	INI.	1
	AUTHORIZATION: Recommendation of Management			TLINU	146)	

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CHAPTER BPA RECORDS 810 MANUAL

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	•	1.2001.0	OFFICE	BPA	FRC	OFFICE
7	Utility Sector Activities, evaluation, and strategies general to all or several issues or programs relating to conservation in electrical utility distribution systems; includes lost opportunities.	R xCB	A+lyr	PEND	INC	A+lyr
<i>r</i> ·	AUTHORIZATION: Recommendation of Management			LIVE		
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See Section 800 8 for explanation of KEY terms.

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CHAPTER

ENGINEERING, DESIGN, AND CONSTRUCTION

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_	·		OFFICE	BPA	FRC	OFFICE	
	ENGINEERING, DESIGN, AND CONSTRUCTION		See Dispos	ition		A+lyr	
	Material relating to the planning, design, and construction						
	of the power transmission system. Data may be recorded on			, , ,	,		
	various media including paper, film, tape, disk, or diskette,	1 1	į.			1	
·	unless otherwise specified in the narrative disposition.						
	Disposition: In accordance with instructions for specific						
	material described by the following related subjects.						
D-11	Engineering Standards and Practices	B	_ S			_s	
	Material relating to authorized engineering standards and		,	. · · · · · · · · · · · · · · · · · · ·]		
	practices used in the design and construction of						
	transmission facilities.					,	
	AUTHORIZATION: BPA Records Schedule & Files Handbook ED-13						
-11-11	Insulation Coordination	ВО	s			s	
	Material relating to the practice of correlating the	1					
	insulating strength of engineering equipment with						
	expected overvoltages and with the characteristics of					1	
	protective devices.					1	
						 	
	AUTHORIZATION: BPA Records Schedule & Piles Handbook BD-34				_	1	
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			OFFICE	BPA	FRC	
D-11-12	Inductive Coordination and Interference	BO	6			- s
	Material relating to the placement, design, construction,					
_	operation, and maintenance of BPA facilties in conformity				. ;	
	with harmoniously adjusted methods that will prevent					
	inductive interference.					
	AUTHORIZATION: BPA Records Schedule & Files Handbook ED-34					
ED-11-13	Audible Noise and Radio Interference	EE	S	14.		s
	Material relating to audible noise and radio interference					
	from BPA facilities.			1		
					•	
	AUTHORIZATION: BPA Records Schedule & Files Handbook ED-34					
ED-11-14	Electrical Effects	EES	s	L ,		S
· ·	Material relating to electric and magnetic fields from				L	ł
	BPA facilities.					
	AUTHORIZATION: BPA Records Schedule & Files Handbook BD-34					
D-13	Research, Development, and Demonstration	- NA	A+2yre	2yrs		3
	Material relating to research, development, and demonstration		WIT	HDRAWN		ł
	projects and authorities.			1		
	AUTHORIZATION: Recommendation of Management	, , , , ,		neman	HD	
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A FILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE
P-12-12	Advisory and Buchange Committees	- AN	A+2yro	2yro		 6
	Material relating to meetings and exchange of information			NITHDRAWN	ł	
	with other local, national, and international research and		5			İ
7	development groups or committees.		•	DEMNI	NG.	1
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	AUTHORISATION: Recommendation of Management			-		i
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D-12-13	Technical Reports	AN	A+2yrs	2yrs		s
•	Final technical reports as a result of research and		_	WITHDRAWN 48		
,	development projects.			THE PROPERTY OF		i
				DEAIN	MU	
•	AUTHORIZATION: Recommendation of Management		•	TENU	ITI	1
				7		ı
D-12-14	Laboratory Test Reports	EL	A+lyr			A
	Material relating to monitoring and testing of BPA					
	facilities and activities. Includes final test reports			WITHDRAWN		
	done by BPA's laboratory. See also OP-19-11, Fault Tests,					
)	and ED-18-11, Test Data.			DEAINI	MP	ŀ
			_	TEMUI		, a
	AUTHORIZATION: Recommendation of Management					·
•						
D-12-15	System Tests	EL	A+lyr			A
	Material relating to staged system tests conducted on the		-			ŀ
	energized transmission system. See also OP-19, Tests.	1	,	WITHDRAWN		
	•			APMIN		1
	AUTHORIBATION: Recommendation of Management			_PFNIII	N.	
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PILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN		OTOTAGE	
•			OFFICE	BPA	FRC	OFFICE
14-11	AC Interties Material relating to alternating current (AC) intertie facilities.	E	A+lyr	3yrs		A
	AUTHORIZATION: Recommendation of Management		. :	PENUI	Nb	
D-14-12	DC Interties Material relating to the direct current (DC) intertie faciliti	E es.	A+lyr	3yrs	٨	A
	<u>AUTHORIZATION</u> : Recommendation of Management			PENDI	NG	
D-15	Transmission Lines Material relating to the planning, design, and construction of transmission lines. Case file by name of transmission line.	EP	A+lyr	3yrs		A
_	AUTHORIZATION: Recommendation of Management			PEND	ING	
15-11	Drawings	SSTD	50vre			s
	All BPA numbered drawings showing the design and construction of transmission lines and structures.					
	AUTHORIZATION: BPA Records Schedule & Files Handbook ED-4(a)&	(e)				
D-15-12	Construction Data Books Reduced-size drawings, site data, stringing data and instructions, and similar construction specifications in book form.	ВО	A+6yrs			 s
· · · · · · · · · · · · · · · · · · ·	<u>AUTHORIZATION: BPA Records Schedule & Files Handbook ED-45(a)</u>					

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			OFFICE	BPA	FRC	
ED-15-13	Transmission Line <u>Design</u>	EF	A+lyr	3yrs		S
	Material relating to general design and construction of					1
	transmission lines. File all specific records in case			ļ		
·	files by transmission line name.			PENDI	MO	
				Krivilli	Nh	
	AUTHORIZATION: Recommendation of Management			7 -1700		
			3.13	3		
ED-15-14	Conductors, Hardware, and Accessories	EP	A+lyr	3yrs		3 .
	Material relating to accessories, reconductoring, operating					
	temperature and general design of conductors used on transmission lines.			DEMON	In .	
	Clausmission lines,			PFIXIII	1	
	AUTHORIZATION: Recommendation of Management			Pitter		
	AOTHORIZATION. Recommendation of Management		•			1
2D-15-15	Structures and Towers	EP	A+lyr	3yrs		s
	Material relating to design and construction of transmission					
	line structures and towers including wood, steel, and other					1
	footings.			OFMON	IIO	1
	-			PHNIII	1	
	AUTHORIZATION: Recommendation of Management			PILIPI	10	
į	,					
D-15-16	<u>Insulators</u>	EF	A+lyr	aryE		S
	Material relating to types of insulators used in the design					1
	and construction of transmission lines.					
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	AUTHORIZATION: Recommendation of Management			PŁNUI	Nh	
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			OFFICE	BPA	FRC	OFFICE
-15-17	Line Crossings	BP	A+2yrs		20yrs	9
	Material relating to crossings such as roads, bridges,					
1	and culverts in the construction of transmission lines.			1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1	١.	
}						1
<i>5-</i>	AUTHORIZATION: BPA Records Schedule & Files Handbook ED-49					1
			3.0		20	
-15-18	Right-of-Way	EP	A+2yrs		28yrs	1 8
	Material relating to permits and clearing during the					
ł	construction of transmission lines.					ł '
	AUTHORIZATION: BPA Records Schedule & Piles Handbook BD-49		L			
	HOUSE DE HOUSE DE HOUSE DE LES CONTRES LES CONTRES LES CONTRES LES CONTRES DE LES					
-15-19	Underground Power Cables	EE	A+lyr			s
	Material relating to types of underground power cables,	.				1
1	including submarine, used in construction of transmission					ľ
·	lines.					
				DENINI	VC .	İ
	AUTHORIZATION: Recommendation of Management			LEMAN	W	
-15-20	Airway Lighting and Obstruction Markings	EE	A	5yrs		S
1	Material relating to the lighting and marking of					
	transmission lines.					
	NUMBER OF TRANSPORT TO A STATE OF THE STATE			-	410	
	AUTHORIZATION: Federal Aviation Administration Records			PENDI	NI.	s
	Retention Schedule, paragraph 5345-1.			1 LIIVI	110	i

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See Section 800.8 for explanation of KEY terres.

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i.			OFFICE	BPA	FRC	OFFICE
-15-21	Sectionalizing Disconnect Switches	EF	S			s
	Material relating to the design and application of manual,					1
,	automatic, and remotely operated sectionalizing disconnect		·			
	switches on transmission lines.	ŧ.		DENDI	MU	
				PEND	Mily	
	AUTHORIZATION: Recommendation of Management			9 61101	,,,,	
-15-22	Grounding and Lightning Protection	EE	S	ļ		S
1	Material relating to the generic design and application of					}
	grounding and/or lightning protection on transmission lines.		,	محمد		
1				PENDI	M!	
,	AUTHORIZATION: Recommendation of Management			TENUI	110	
-15-23	Corrosion	EE	S			S
	Material relating to the investigation and mitigation of			1		
1	corrosion problems on the BPA system.				in	i
				DLNIII		
1	AUTHORIZATION: Recommendation of Management			LLIUI	JU	
,						
=15-24	Access Reads	PP P	A+2yrs		28yrs	<u> </u>
	Material relating to the location and design of roads and					
	related items for the construction of new transmission					
	lines and the maintenance of existing lines.					
	AUTHORIZATION: BPA Records Schedule & Piles Handbook ED-49		· .			
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FILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE
15-25	Geotechnical	EF	A+lyr			S
	Material relating to the investigation, evaluation, design,				- - 2/14 p	
`	and inspection of facility foundations, landslides,			1 1 1		
	streambank erosion, water wells, and other related					
	geotechnical concerns. Includes committee work with ASCE,		•	nriini	NU	
\$1	IEEE, and EPRI to establish geotechnical industry standards.			Privili	Nis	
				PILL	110	
	AUTHORIZATION: Recommendation of Management				l ŧ	
*;**				7:	· · · ·	1
D-15-26	Construction Specifications	EF	A+lyr			Α
	Material relating to industry standards and specifications		~			
ed a-	and transmission engineering standard construction				1	·
	specifications.	1		PENDI	MO	•
				TENIN	W N	
	AUTHORIZATION: Recommendation of Management			7 2000		
ļ						
<u>l</u> -15-27	Material Specifications and Evaluation	EF	A+lyr	ļ		Α
	Material relating to the development of material	}				
	specifications for use on transmission line items.					
				hrun	NIO	ļ
	AUTHORIZATION: Recommendation of Management			PENU	INI.	
		ł		LITU	TIV .	
-15-28	Stringing Instructions	EF	A+6yrs		 	
	Material consisting of conductor and groundwire					1
	stringing and installation data and instructions which] .	
.	are not included in construction data books.					
						1
	AUTHORISATION: BPA Records Schedule & Handbook ED-45(a)					

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PFILE GUIDE AND RETENTION SCHEDULE

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ED-15-29	Line Loadings	EP	A+lyr			S		
Į	Material relating to the mechanical and meteorological					1		
	loadings on transmission lines.	1 1		DELLO	110			
,				PEND	INI.			
	AUTHORIZATION: Recommendation of Management			1 LITU	1110			
	normalization, secondaria de transjonant				1	•		
BD-15-30	Line Ratings	EF	A+lyr			s		
DD-13-30	Material relating to operating temperature and electrical	EE		1	1	1		
1	loading of transmission lines.							
	roading of Clausmission lines.			arini	NU	ı		
				PHNIII	NI	· ·		
	<u>AUTHORIZATION</u> : Recommendation of Management			ILIIDI	110	ı		
			_	ļ				
ED-15-31	Conductor Clearance	EP	A+lyr		ļ	S		
l	Material relating to mechanical and electrical clearances							
1	between conductors or groundwires and other conductors,				1			
	groundwires, ground structures.			AFUNI	In	ı		
				H-NIII				
1	AUTHORIZATION: Recommendation of Management			ILIVI	IU			
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-15-32	Electrical Clearance Analysis	EF	A+lyr			λ -		
	Material relating to the analysis process which checks		_					
	a transmission line for spans having less than the			- 1	,	ı		
	required ground clearance ("hot checks").			1	1			
	redutted atomic clearance / not checks /:			NEVIDI	NV			
	NUMBER OF TRANSPORTED TO THE PROPERTY OF MANAGEMENT			Privili	Wis			
	<u>AUTHORIZATION</u> : Recommendation of Management			FILE	110			
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BPA 810 RECORDS MANUAL

CHAPTER

TENGINEERING, DESIGN, AND CONSTRUCTION

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FILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE		
15-33	Switches	EF	λ+lyr	Ì		S		
	Manufacturers design criteria and drawings; photographs,					,		
	specifications, and design drawings related to new and				L.			
	existing transmission disconnect switches.			PENDI	MI.			
	NICHORE PROGRAMMENT AND A SECOND PROGRAMMENT A			LITUI	IVU	:		
	AUTHORIZATION: Recommendation of Management] _				
ED-16	Photogrammetry and Curvey		3 4 3 ains	}		1.		
ED-10	Photogrammetry and Survey	EP	A+lyr			^ ′		
Th.	Material relating to planning, surveying, design,		-			Į.		
	construction, and maintenance of transmission facilities serving the BPA system.							
	serving the BPA system.			h FNIII				
	AUTHORIZATION: Recommendation of Management	1		ILITUII	TU			
	AUTHORIZATION: Recommendation of Hanagement			1		1		
FD-16-11	Aerial Photographs	EP.	146vre					
	Material relating to survey and mapping for the design				+			
	and construction of transmission lines.			:				
	AUTHORIZATION: BPA Records Schedule & Files Handbook ED 24(a)		<u> </u>					
FD-16-12	Dhahamanah ni a Manta Dannah		_					
-T0-T7	Photogrammetric Work Requests Material relating to requests for photogrammetric	BP	3yro—			 		
	transmission line surveys, danger tree studies, tower							
	studies, contour maps, access roads, photogrammetric digital			WITHDRAWN				
	data, photomaps and photomosiacs, special purpose image]		
	processing products/services, remote sensing studies.	-		GENDI	10			
	Latitudes, total and tomoro bonding boudles.			H-NIII	M.			
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FILE GUIDE AND RETENTION SCHEDULE

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D-16-13	Analytical Stereoplotter Systems	EF	3yrs	HBRAWN	 	<u> </u>	
	Correspondence and literature pertaining to BPA		,001	Inplotein			
	stereoplotter systems.			*ULTIUI	NO		
				PENDI	Nh	1	
. 1	AUTHORIZATION: Recommendation of Management	1		1 Pilm.	110		
D-16-14	Photogrammetric Equipment	E P	3yrs			S	
	Correspondence and literature pertaining to all types of		987	THORAWN	i	1	
	photogrammetris equipment.		-			1	
				DLAIII	MP -	ì	
	AUTHORIZATION: Recommendation of Management			[LITUII	ND		
		1				ŀ	
D-16-15	Remote Sensing	EP	3yrs			S	
	Material relating to collection and analysis of remotely		Wil	HPRAWN		· [
	sensed data.						
				IL WIII N			
	AUTHORIZATION: Recommendation of Management			PENDIN	U		
			J				
P-16-16	Topographic Mapping	EP	3yrs		1	A	
,	Material relating to topographic mapping performed by or	\checkmark 1				1	
	for BPA.		WITI	IDRAWN			
		1		ULYINI	ML		
	AUTHORIZATION: Recommendation of Management			Privili	MA	1	
				7			
D-16-17	Digital Photogrammetric Data	EF	3yrs			A	
	Material relating to photogrammetric digital data prepared		_		L		
	by or available for use on BPA systems.	[All	HERAWN			
,	.,	[DEVIDI	NIC >	1	
	AUTHORIZATION: Recommendation of Management			rfivili	MD		
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FILE GUIDE AND RETENTION SCHEDULE

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16 18	Image Processing	EP	3yre -			- >		
	Correspondence and literature relating to image processing		Wi	TH DRAWN	1			
	systems, methods, and projects.			PRINT	10			
				nrviili	MI.			
	AUTHORIZATION: Recommendation of Management			LITUII	IU	i		
					٠ ,			
D-16-19:	Right-of-Way Clearing Study	EP	3yrs	ŀ		A		
	Correspondence relating to photogrammetric danger tree							
•	studies and BPA clearing design.		WI	THORAWN				
5 6				ULIIDII	in.	· f		
	AUTHORIZATION: Recommendation of Management			rt Milli	YI.			
,	Motion and Management			LIIUII	TV			
D-16-20°	Photomaps/Photomosaics	EF	3yrs			s		
D-10-20		- LEF	_	ĺ		. 3		
•	Material relating to all types of BPA photomaps and		_	NITHDRAWN		1		
	photomosaics including right-of-way maintenance photomaps,				•			
	danger tree photomaps, and photomaps/photomosaics for		_	THE IS				
	issues such as new transmission line projects, substation		1	LNITH	Ľ			
	sites, and PCB studies.			ENDIN		J		
	·							
· · · · · · · · · · · · · · · · · · ·	AUTHORIZATION: Recommendation of Management		<u> </u>			\rightarrow		
	· .			·				
D-17	Stations	EE	A+lyr			S		
	Material relating to the planning, design, and construction					Ī		
	of stations, including substations, radio stations, gaging							
	stations, repeater stations. Case file by name of station.			PLIN	10			
				PENDI	NI.			
,	AUTHORIZATION: Recommendation of Management			II LIYUI	HU	,		
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See Section 800.8 for explanation of KE7 terms.

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FILE GUIDE AND RETENTION SCHEDULE

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RD-17-11	Drawings	SSTD	50yre			<u>s</u>	
	All BPA numbered drawings showing the design and construction of stations.		_				
	AUTHORIZATION: BPA Records Schedule & Files Handbook ED-4(a)&	(e)				,	
ED-17-12	Station Design Material relating to general design and construction of stations. Pile all specific records in case file by station name.	EE	A+lyr			s	
	AUTHORIZATION: Recommendation of Management			PENDI	16		
BD-17-13	HVDC Terminals	ВО	- 5			<u> </u>	
	Material relating to the planning, design, and construction, of HVDC terminals.	1					
-17-14	AUTHORIZATION: BPA Records Schedule & Files Handbook ED-34 High-Voltage Equipment Material relating to the engineering, design, specification and operation of high-voltage substation equipment. Case	EO	S			s	
	file by equipment type, such as transformers, power circuit breakers, and shunt capacitors. <u>AUTHORIZATION: BPA Records Schedule & Piles Handbook ED-34</u>						

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See Section 800.8 for explanation of KEY terms.

ENGINEERING, DESIGN, AND CONSTRUCTION

D 04-15-88 T DOE/NARA

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FILE GUIDE AND RETENTION SCHEDULE

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PP-17-15	Power System Control Substation Data Systems	EED	A+3yrs			À
	Material relating to substation data systems such as SER,			1		
	SCADA, and Annunciators.			drun.	410	
				PENDI	NI.	1
	AUTHORIZATION: Recommendation of Management			1 LIIVI	ĮVU	
BD-17-16	Power System ControlSubstation Metering and Telemetering	EED	A+3yrs			λ
	Material relating to SM&T such as RMS, KWN, and AGC telemetry.			1_		
*				VLVIDI	NU	
·	AUTHORIZATION: Recommendation of Management			PENDI	N v	1
				7 -1101	110	
ED-18	System Construction	MK	- 1 − 1 − 1 − 1 − 1 − − − − − − − − − − 			
	Material relating to the actual on-site construction of	•				1
	the power system. Includes daily progress reports, diaries,					
	correction memos, and similar documents. See also SU-12-13,			ŀ	İ	I
	Construction Contracts.					
_		,				1
	AUTHORIZATION: BPA Records Schedule & Files Handbook C-4(b)	İ				1
				ľ		
ED-18-11	Test Data	MK	See Disp	osition		A
,	Material relating to the testing of power systems prior to					
	energization. Case file by line or station name. See also					
	ED-12-14, Laboratory Test Reports, and OP-19-11, Fault Tests.					
	<u>Disposition</u> : Destroy when related equipment or facility is				1	ŀ
	disposed.				<u> </u>	
				10 1	1	†
	AUTHORIZATION: BPA Records Schedule & Piles Handbook C-5(a)	 			 	
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ED-18-12	Energization	MK	See Dispos	ition-	<u> </u>	
BD-18-13	Material relating to the energization of power systems. Case file by line or station name. Disposition: Destroy when related equipment or facility is disposed. AUTHORIZATION: BPA Records Schedule & Piles Handbook C-5(a) As-Constructed Schematic Drawings Substation electrical wiring and schematic drawings which reflect the as constructed configuration. See also BD-15-11, Drawings, and BD-17-11, Drawings. Disposition: Dispose of when no longer needed for administrative purposes.	MK	See Dispos			s
)-19	Engineering Environmental Considerations Material relating specifically to environmental considerations guiding the engineering, design, and construction of transmission facilities. See also EQ, Environmental Quality. AUTHORIZATION: Recommendation of Management	EF	A+lyr	ENDIN	lc	s

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ENGINEERING, DESIGN, AND CONSTRUCTION

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FILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE		
19-12	Spill Prevention Control and Countermeasure	EF	5yrs			s		
	Material relating to design and application of the spill							
	prevention control and countermeasure (SPCC) system.			-				
	•			PENDI				
	AUTHORIZATION: Recommendation of Management			TLIIUII	JU			
*		i						
D-19-13	Weather	EP	S		 	s		
	Material relating to the planning, design, and construction					ſ		
	of protection systems, including records relating to							
•	wind, icing, floods, and lightning.							
•								
	AUTHORIZATION: BPA Records Schedule & Files Handbook ED-33							
					,			
D-19-14	Terrain	EF	S		j	s		
	Material relating to the planning, design, and construction		,			*		
	of protection systems, including records about earthquakes			\rightarrow				
	and slides.							
<u></u>	AUTHORIZATION: BPA Records Schedule & Files Handbook ED-33							
D-20	Communication and Protection	EEC	A+lyr			1,		
D-20	Material relating to communication equipment and protective	EEC	MATAE	1		1 ^		
	devices on the BPA system.		,			1		
	devices on the Brn Systems			ACLINI	110			
	AUTHORIZATION: Recommendation of Management			PEND	NI.			
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D-20-11	Protective Relaying	BEP	A+lyr			Α		
•	Material relating to protective relaying. File	1 1						
	alphabetically by station name.			OFLIDI	10			
•				PENDI				
	AUTHORIZATION: Recommendation of Management			IFIIDI	1Ç			
		1 1				Ì		
D-20-12	Microwave System	EEC	A+lyr	1.		Α		
	Material relating to BPA microwave systems, including					1		
	frequency management.							
	,	1		PENDI	NO	l		
•	AUTHORIZATION: Recommendation of Management	1 1		PERMI	Wh			
					•••			
D-21	System Planning	EO	A+lyr	1		- A		
* *	Material relating to planning power transmission systems.							
				DENID	MO			
	AUTHORIZATION: Recommendation of Management			PENDI	N h	i l		
				PERM	110			
D-21-11	Customer Utility	EO	A+lyr			λ		
	Customer transmission system data, including studies and			1		ı		
	correspondence.							
				PENDI	NL			
	AUTHORIZATION: Recommendation of Management			LEMUI	Wh			
				1 -0 4				
0-21-12	Loads	EO	A+lyr			A		
	Electrical load data, including forecasting information							
•	and forecasts.		*	J. C. L 457 44	~			
				NTVIIII)	II C			
	AUTHORIZATION: Recommendation of Management			TLIVUI	V()			
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0-24-12	RAS for Eastern Interties	EEP	A+lyr			s
	Material relating to Eastern Intertie Remedial Action					ł
•	Schemes.			ncum	MI B	1
				PENDI	1113	1
	AUTHORIZATION: Recommendation of Management			1 61101	,,,	
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0-24-13	RAS for Southern Interties	EEP	A+lyr	j		S
- 47	Material relating to Southern Intertie Remedial Action		_			
77	Schemes.		ſ	DEMONI	in	1
				PENDI	NI.	1
}	AUTHORIZATION: Recommendation of Management			FIIDI	ITU	
• ' ,						
D-24-14	RAS for Direct Current Interties	EEP	A+lyr			S
	Material relating to Direct Current (DC) Intertie Remedial	ŀ	_			ł
•	Action Schemes.			-	110	
				PENDI	NI.	
1	AUTHORIZATION: Recommendation of Management			1 LITUI	IIU	
. 1		1			, J.	1
-24-15	Other RAS	EEP	A+lyr	İ		s
ļ	Material relating to remedial action schemes not identified		_			1
	in the tertiary subjects ED-24-11 through ED-24-14.			-		1
		1 1		PENDII	MI,	1
	AUTHORIZATION: Recommendation of Management		1	LITUII	N.C.	ł
		i }				
0-24-16	HVDC Control Systems	EEP	A+lyr			s
	Material relating to high voltage direct current		_			
	(HVDC) intertie controls.			ICMDIA	1b	
′	· · · · · · · · · · · · · · · · · · ·	ŀ		[[[[]]]] [] [] [] []	7 7	
	AUTHORIZATION: Recommendation of Management	i I	•	711211		

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ENGINEERING, DESIGN, AND CONSTRUCTION

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0-22-12	Transient Stability Program	ВО	A+lyr			s		
	Material relating to the BPA and WSCC transient stability]]	-	·]		•		
	computer program.	1 1		BEADE	10			
				PENDI	M!			
	AUTHORIZATION: Recommendation of Management			I LIIVII	VU			
,								
BD-22-13	Electromagnetic Transient Program	EO	A+lyr			S		
	Material relating to BPA's electromagnetic transient							
	computer program (EMTP).			T-	110	· I		
				PEND	MI.	ł		
	AUTHORIZATION: Recommendation of Management			1 LIVE	IVU			
						·		
D-23	System Reliability Criteria	EO	A+lyr			s		
	Material relating to the planning for system stability.				216			
	NUMBER TRANSPORT			PENDI	NI.			
	AUTHORIZATION: Recommendation of Management			ILIVI	IVU			
0-24	Remedial Action Schemes and Control Systems	BEP	A+lyr			s		
D-24	Material relating to planning, design, and construction of	DEF	WILL	1		1		
	remedial action schemes (RAS) and system controls. See also]				
	OP-16, Stability Control Schemes.			DELLA	10			
	or 107 Beabliff Control Benemes.			PENDI	MI'a			
	AUTHORIZATION: Recommendation of Management			I LIIVII	W	1		
D-24-11	RAS for Northern Interties	EEP	A+lyr	Į Į		s		
	Material relating to Northern Intertie Remedial Action		· -					
	Schemes.			JEMBINIA				
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	AUTHORIZATION: Recommendation of Management		•	41111111	U			

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)-21-13	Resources	EO	A+lyr .		ļ	λ		
	Electrical generation power and energy data and forecasts.	`\						
				DEMINI				
1	AUTHORIZATION: Recommendation of Management			TLIVII	IU	į.		
D-21-14 ·	Capacitor Switching	EO	A+lyr			S		
	Material relating to switching of series and shunt		,					
	capacitors for stability control.							
		ļ		PENDI	Mr	.		
	AUTHORIZATION: Recommendation of Management			LEMMI	!U (}	1		
		1 1						
D-21-15	Dynamic Braking	. EO	A+lyr			S		
	Material relating to switching of load braking resistors							
}	to control system stability.] [A-1101	10	•		
1	·			PENDI	M.	·		
	AUTHORIZATION: Recommendation of Management			ILITUI	TU			
	DD W 2 2.11							
-21-16	DC Modulation	EO	A+lyr			S		
	Material relating to modulation of power levels on direct]			j			
	current (DC) transmission lines for stability control.			BEHRU	10			
	NIMUODI GAMTON. December de Lieu e 6 Management			PENDI	M.			
	<u>AUTHORIZATION</u> : Recommendation of Management			ILIIDI	TU			
0-21-17	Past Valving	EO	A+lyr			s		
,-21-1,	Material relating to fast valving of steam supply to		MILL] ~		
	thermal electric generators for stability control.							
	chermar efectio denerators for scantiffy confitor.			nrkinii	MU.			
	AUTHORIZATION: Recommendation of Management			KLIMIN	MI	I		
	ACTION 12011 OF Management			PILIPI				

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			OFFICE	BPA	FRC	OFFICE	
ED-21-18	Generator Dropping	EO	A+lyr			S	
	Material relating to disconnection or tripping of						
1	electrical generators to control system stability.						
				UENIII		1	
	AUTHORIZATION: Recommendation of Management			LLIIUII	IU	'	
ED-21-19	Single-Pole Relaying	BO	A+lyr			s	
	Material relating to single-pole relaying and switching						
	of power circuit breakers to control system stability.			Aruni	110	1	
				DFVIII	NI.	i	
	AUTHORIZATION: Recommendation of Management			PENDI	NU	,	
•	100 211 011 2 011 1 1 1 1 1 1 1 1 1 1 1				: 4		
ED-21-20	Load Representation	EO	A+lyr			s	
	Material relating to load representation and modeling in						
	transient stability computer programs.				l	1	
				PEND	MU		
	AUTHORIZATION: Recommendation of Management			Privil			
	NOTION 1000 MAIN OF THE STATE O			7			
2D-22	System Analysis Methods	ВО	A+lyr]	s	
,	Material relating to methods for controlling the transient		-		1	1	
	and dynamic stability of electrical power system.						
				DEAID	MU	*	
	AUTHORIZATION: Recommendation of Management			PENDI	Nk.		
	described and reduced the contract of the cont			PILLI	1467		
D-22-11	Power Plow Program	ВО	A+lyr			s	
	Material relating to the BPA and WSCC power flow computer						
	program.						
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	AUTHORIZATION: Recommendation of Management			LLIVUI	NU	I	
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CHAPTER

ENGINEERING, DESIGN, AND CONSTRUCTION

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02-24-89 DOE/NARA

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN	STORAGE		IN .
		1.200	OFFICE	BPA	FRC	OFFICE
-24-17	Other Control Systems Material relating to control systems not identified in the tertiary subjects ED-24-11 through ED-24-16. AUTHORIZATION: Recommendation of Management	EEP	A+lyr	PENDI	NG	S
0-24-18	Control System Development Support Material relating to control system support projects.	EEP	A+lyr	PENDI	VI (s
:	AUTHORIZATION: Recommendation of Management			LEIVUI	IVU	
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	ENVIRONMENTAL QUALITY		See Dispos	ition	•	A		
	Material relating to development and implementation of policy and procedures for environmental evaluations and ecological			,				
	and pollution issues. Data may be recorded on various media]		·		i		
	including paper, film, tape, disk, or diskette, unless							
	otherwise specified in the narrative disposition.					}		
	Disposition: In accordance with instructions for specific				•	}		
	material described by the following related subjects.					1		
	AUTHORIZATION: Recommendation of Management				•			
	The retention periods for the Environmental Quality series							
	(including its secondary and tertiary subjects) are justified as follows:							
	Temporary Records - Retention periods of 5 years and longer					İ		
	are needed (1) because of the need to support environmental		•					
	quality decisions to the Northwest Power Planning Council					į,		
	and (2) because of potential for being named as a responsible party in Superfund regulatory actions.							
	Permanent Records - These retention periods are from							
	Pederal environmental regulations and Environmental							
	Protection Agency (EPA) records schedules.							
)-11	Environmental Quality Issues, Programs, and Projects	AJ ·	s		5yrs	s		
	Material relating to environmental aspects of various BPA							
	issues. Case file by BPA organizational unit.		į	DEAIDI	NO	1		
	AUTHORIZATION: Recommendation of Management			LCIANI	NU			
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APILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE
3Q-12	Environmental Coordination Material relating to coordination of environmental quality objectives with all programs and activities of BPA; and the development and implementation of policy to assess environmental impact of BPA programs. Includes coordination activities with other agencies and organizations. Case file by type of agency or organization. See also ED-19, Engineering Environmental Considerations. AUTHORIZATION: Recommendation of Management	AJ	S	PENDI	Syra	s
0-13	Environmental Assessments	A.I.	See Dispo	sition		5vrs
	Material relating to the preparation, review, and approval process for Environmental Assessments. Individual assessments and Findings of No Significant Impact are case filed by project name at this location or are filed with the applicable program or project under another primary. Disposition: Break file upon preparation of final statement and record of decision. Keep in office 5 years then transfer to PRC. Keep in PRC 10 years, then offer to NARA in 5-year blocks. Approximately 10 linear feet retained in case file order with an annual accumulation of 2 linear feet. AUTHORIZATION: Environmental Protection Agency D/1(9)		WITH	PENNI	VC-	
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A - ACTIVE

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APILE GUIDE AND RETENTION SCHEDULE

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FILE CODE		RECORD	IN	STORA		IN	
			OFFICE	BPA	FRC	OFFICE	
2-14	Environmental Impact Statements	AJ.	See Dispo	sition	ļ	5yre	
	Material relating to the preparation, review, and approval of statements for BPA projects. Material consists of manuscript drafts of statements, notices of intent, correspondence with citizen groups, news clips, comments on the draft made by all interested parties, transmittal letters, manuscript for final statement, comments on final statement, and DOE approval. May also include copies of environmental assessments, special studies, and other supplementary material created in the course of statement preparation. Published ESSs and Records of Decision are case filed by project name at this location or filed with the applicable program or project under another primary subject. Disposition: Break file upon preparation of final statement and record of decision. Keep in office 5 years then transfer to FRC. Keep in FRC until 15 years old, then offer to NARA in 5-year blocks. Approximately 30 linear feet retained in case		WITHI	OF AWA			
	file order with an annual accumlation of 4 linear feet. AUTHORIZATION: Environmental Protection Agency D/1(9)		·	PENDI	NC		
EQ-15	Exclusions Material relating to exclusions. Case file by fiscal year.	AJ	A+lyr ·		4yrs	A	
	<u>AUTHORIZATION</u> : Recommendation of Management			PENDI	NG		

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See Section 8008 for explanation of REY terms

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AFILE GUIDE AND RETENTION SCHEDULE

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a transmitte in commence or our commence or a training groups again and a training			OFFICE	BPA	FRC .	OFFICE
Q-15 - 11	Categorical	LA	A+lyr		4yrs	A
•	Material relating to categorical exclusions.					,
	•			DEVIDI	MO	
	AUTHORIZATION: Recommendation of Management			PENDI	N h	
		·	_	7 -1100	-	<u> </u>
2-15-12	Individual	LA	A+lyr	1	4yrs	A
	Material relating to individual exclusions.					
				DEMINIA		
	AUTHORIZATION: Recommendation of Management			PHNIIN	h	I
				# Parker	400.00	1.
2-16	Environmental Reviews	AJ	A+lyr		4yrs	A
	Reviews and comments prepared relative to environmental					4
•	documents of other agencies and organizations. Case file			PRINI	110	
	chronologically or alphabetically.			PENDI	MI.	
	AUTHORIZATION: Recommendation of Management			LITE	ĮΨ	1
	AUTHORIZATION: Recommendation of Hanagement			İ		
Q -1 7	Environmental Audit and Appraisal Program	λJ	4yrs		8yrs	4yrs
	Appraisals of BPA facilities and activities that have		_			1
	environmental effects. Case file by BPA organizational			1		
	unit and site using the following subjects as needed.		•	_		
				ULYIDII	In	
	AUTHORIZATION: Environmental Protection Agency C/18(9)			TENIII	Vis	
				W (2017)	שין	
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See Section 800 B for explanation of KEY terms

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APILE GUIDE AND RETENTION SCHEDULE

	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE I	RETENTION PERIOD					
FILE CODE		OF RECORD		FICE OF RECOR				
FILE CODE			IN	STORA	GE	IN		
			OFFICE	BPA	FRC	OFFICE		
7-11	Management Appraisals Material relating to establishment and implementation of	AJ .	4yrs		8yrs	'4yrs		
	the Environmental Appraisal Program plans. Case file by							
	year performed.			PENDI	NC			
· :	AUTHORIZATION: Environmental Protection Agency C/18(9)			Pilmi	Afr			
0-17-12	Punctional Appraisals	LA	4yrs		8yrs	4yrs		
	Material relating to annual review of environmental specialty disciplines as applicable to elements of the							
	environmental program. Case file by year.			PENDI	NC			
	<u>AUTHORIZATION</u> : Environmental Protection Agency C/18(9)			LINU) BEP			
Q-17-13	Field Appraisals	AJ	4yrs		8yrs	4yrs		
	Documentation of annual onsite appraisals of environmental program effectiveness. Case file by year and specialty.			-				
• .	AUTHORIZATION: Environmental Protection Agency C/18(9)			PENDI	NI.			
				, E11W		İ		
Q-17-14	Internal Audits Material relating to the examination and evaluation of work	LA	4yrs		8yrs	4yrs		
	with environmental program standards. See also MN-17, Audits.					1		
	AUTHORIZATION: Environmental Protection Agency C/18(9)			PENDI	IC			
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APILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE		
Q-18	Hazardous Waste Management Program	λJ	A+2yrs		ľ	λ		
	File all related material here except as specified in the		_			į		
	following tertiary subjects.			ŀ		ł		
		i		DEMDI)IV	1		
	AUTHORIZATION: Recommendation of Management			PENDI	NI,	1		
	·			FILL	144	1		
ZQ-18-11	Resource Conservation and Recovery Act							
						Ĭ		
	(a) Biennial, exception, and other Resource Conservation	AJ	3yrs		20yrs	S		
	and Recovery Act (RCRA) reports.			1				
				DEVIU	NV	}		
	AUTHORIZATION: Recommendation of Management			TEMIN	Y			
	(h) pop) A - t							
	(b) RCRA test results and waste analyses.	AJ	See Disp	OBITION				
	Disposition: Retain in office for 3 years from date last sent			İ		j		
	to treatment, storage, or disposal then transfer to PRC until							
	23 years old, then destroy.			5				
	25 feats stay their descript			PENDI	Mi,	1		
)	AUTHORIZATION: Recommendation of Management			ILLIVII	VU	j		
i .	inestrative in the state of the							
	(c) Storage facility operating records and closure plans	AJ	See Disp	osition				
	(Ross Complex).		Dec Dibp					
	•				,			
	Disposition: Retain in office until facility closed and							
	closure is certified. Then transfer to PRC for 20 years.			DEVIDIA	ir			
				LEMAN				
	AUTHORIZATION: Recommendation of Management				·- •-·			

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AFILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE		
8-11 cont.)	(d) All other RCRA material, including compliance data.	AJ	6yrs		20yrs	6yrs		
	<u>Disposition</u> : Retain in office for current year plus 5 years then transfer to FRC, destroy when 26 years old.					DEMINI	NC.	
3	AUTHORIZATION: Recommendation of Management	•		PENDI	NU			
2-18-12	Toxic Substance Control Act	AJ.	- See Disp e	sition		 		
	Disposition: Break file upon completion of actions. Keep		40711	RAWN	\$ 1 × B			
	in office 3 additional years, then send to FRC. Keep in		Mitter					
•	PRC 15 years, then offer to NARA in 5-year blocks.			İ		1		
	Approximately 12 linear feet retained in case file order					1		
	with an annual accumlation of 20 linear feet through next							
	3 years (FY89) then 6 linear feet per year annually.			DENIN	NC			
	AUTHORIZATION: Environmental Protection Agency C/3(10)(f)(2)			LTIM				
0-18-13	Comprehensive Environmental Response Compensation and Liabilit	y Act						
	(a) Agreements and related material about the Comprehensive Environmental Response Compensation and Liability Act (CERCLA) and the "Superfund."	AJ	A		20yrs	A		
	<u>AUTHORIZATION</u> : Environmental Protection Agency B/4(10)(5)(d)			PENDI	NG			

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See Section 800.8 for explanation of Kt Y terms

^{*} FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

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A FILE GUIDE AND RETENTION SCHEDULE

		OFFICE	RETENTION PERIOD					
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN	STORAGE		IN		
	· .	necono	OFFICE	ВРА	FRC	OFFICE		
EQ-18-13 (cont.)	(b) Material relating to CERCLA claims.	ĄJ	See Dispos	ition				
	<u>Disposition</u> : Retain for 6 years from date of award or until cost recovery is initiated by EPA, whichever is sooner.			PENDI	NC			
	AUTHORIZATION: 40 CFR 306.32, Subpart C			LIIU	141)	1		
	(c) Documentation about CERCLA remedial investigations	λ1	See Dispos	ition				
	and site feasibility studies.		WITH	RAWN				
	Disposition: Transfer to FRC 2 years after close of activity.				,	,		
,	Offer to NARA in 5-year blocks when 20 years old.							
. •	Approximately 4 linear feet retained in case file order with							
	an annual accumlation of 4 linear feet.			FNII	NE			
	AUTHORIZATION: Environmental Protection Agency C/21(17)(b)			LITER	100			
Q-18-14	Uniform Hazardous Waste Manifests	SRMP	See Dispos	ition		3yrs		
	The original manifest (BPA 1793) for shipping hazardous wastes which include TSCA regulated PCB and PCB-contaminated	хD	-					
,	equipment; nonregulated PCB-contaminated equipment; and	٠.						
	hazardous wastes shipped off-site. See also TT-12-13, BPA Rail Cars, Carrier Files, Hazardous Materials.					1		
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^{*} FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

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AFILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	DECODE CEDIES TITLE DESCRIPTION AND MODOSITION	OF		CE OF RECOR		OTHER COPIES	
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA	_	OFFICE	
			OFFICE	8PA	FRC	OFFICE	
E(Disposition: Retain in office for 3 years from date of acceptance by initial transporter or for 3 years from date of acceptance at a BPA hazardous waste facility. Then transfer to FRC for 20 years. AUTHORIZATION: Recommendation of Management			PENDI	NG		
EQ-19	Environmental Contaminants Material relating to the effects and hazards of all types of contaminants. Case file by type. AUTHORIZATION: Recommendation of Management	AJ	s	PENDI	NC	s	
●	Other Regulatory Actions Material relating to actions either on the part of or that affect BPA's programs and activities and that are not addressed elsewhere. Disposition: Break file upon completion of actions. Retain in office 3 additional years, then send to FRC. Retain at PRC for 15 years, then offer to NARA in 5-year blocks. Approximately 1 linear foot retained in case file order with an annual accumulation of 1 linear foot.	N	Sec Diop	THE RAWN	NC	*	
,	<u>AUTHORIZATION</u> : Environmental Protection Agency C/3(10)(f)(2)			FLIVO	1116		

A - ACTIVE
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See Section 800.8 for explanation of KLY terms.

x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

Z - ORIGINATING OFFICE

!EXTERNAL ISSUES

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AFILE GUIDE AND RETENTION SCHEDULE

		OFFICE I		RETENTIO	ON PERIOD	
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	in in	STORAGE		IN .
			OFFICE	BPA	FRC	OFFICE
	EXTERNAL ISSUES Material pertaining to the formal and informal relationships between outside interests and BPA, and efforts to keep the public informed. Does not include contracts or customer data or agreements. Data may be recorded on various media including paper, film, tape, disk, or diskette, unless otherwise specified in the narrative disposition.		See Dispos	ition	ing 5	A+lyr
	<u>Disposition</u> : In accordance with instructions for specific material described by the following related subjects.					
x-11	Media/Publications Material detailing approaches and procedures for use with various types of media.	ALM PJS SSG	See Dispos	ition	5 - t	A+lyr
	Disposition: In accordance with instructions for specific material described by the following related subjects.		!			
X-11-11	Audiovisual/Photography					
	Haterial including still and motion pictures, video and audio recordings, filmstrips, exhibits, posters, and related captions, texts, and identifications. (All video media			**	\$ P :	
	retained by SSG. "Audiovisual" refers to audio, visual, and audiovisual material unless otherwise specified.)					
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See Section 800.8 for explanation of KLY terns.

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		OFFICE		RETENTIO	N PERIOD	
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA		iN
			OFFICE	BPA	FRC	OFFICE
EX-11-11	(a) BPA sponsored official photographs, and mission-	SSL	5yrs	-	P	<u> </u>
reant.)	related slide sets, filmstrips, original graphic arts, films, video and sound recordings, and related documentation. Includes agency-sponsored media for public distribution or internal training as well as other material not identified below. Approximately 9 linear feet of paper files are stored in the work area. Annual accumulation varies with an average					
	of 2 inches per year. Offer to NARA when obsolete or after 5 years, whichever occurs first. AUTHORIZATION: BPA Records Schedule and Files Handbook PRI/8(a)(1)				
	(b) Routine audiovisual productions not selated to BPA mission functions. AUTHORIZATION: GRS 21/1	Z	l yr or s			S
	(c) Audiovisual material acquired from outside sources for entertainment or recreation. AUTHORIZATION: GRS -21/16 21/10; 2//15	2	s			s
	(d) Personnel and management training audiovisual materials acquired from outside sources. AUTHORIZATION: GRS 21/15 21/14	SPRD	A+lyr			A

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CHAPTER 810 RECORDS MANUAL

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			OFFICE	BPA	FRC	OFFICE
EX-11-11	(e) Personnel identification photographs for current	222	5yrs	_ <u> </u>		
(cent.)	employees.		or A	18	<u> </u>	
	•				•	
	AUTHORIZATION: GRS 21/2	+	•			
	(f) Line and halftone negatives, screen paper prints,	SSG	S			S
	and offset lithographic plates used for photo-mechanical reproduction.				Ì	
1272	reproductions					
	AUTHORIZATION: GRS 21/11 21/7					
<u>,</u>						
	(g) Line copies of graphs and charts.	z	A+lyr			s
	2110		or S	1		1
	AUTHORIZATION: GRS 21/12 21/8					
	(b) Bouting summaillenes forting and resembles					
	(h) Routine surveillance footage and recordings.	ESS	S			S
	AUTHORIZATION: GRS 21/17 21/11; 21/18					i i
`	nother and style of the style o			1		İ
	(i) Daily or spot news recordings available to local	SSG	6mos			s
	radio stations on a call-in basis.		or S			
	2/126					1
	AUTHORIZATION: CRS 21/50 2/26				ļ	
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN	STOR	AGE	IN
			OFFICE	BPA	FRC	OFFICE
X-11-11	(j) Dictation tapes and recordings made exclusively for	2	See Dispos	ition	<u> </u>	<u> </u>
contri	transcription or notetaking.				}	
	Disposition: Destroy immediately after use.					
	AUTHORIZATION: GRS 21/47 21/27					
x-11-12	History/Annual Reports	ALM	20yrs WIT	HDRAWN	P	A+lyr
	Material reflecting BPA history and including BPA Annual	SSL		1		
1	Reports. Approximately 1 1/2 linear feet of paper files are		_			
	stored in the work area with an accumulation of $1\ 1/2$ inches	•				
	per year. Offer to NARA in 5-year blocks when 20 years old.		,			•
						_
	AUTHORIZATION: CRS 16/13(c)				 	
x-11-13	Media Contacts	ALM	A+3mos			A+3mos
<u></u>	Records of current contacts for all media and approximate	VPU	ATOMOS			אסוווכיא
	extent and kind of audience reached by the different news					ł
	and public affairs media; schedules of news deadlines and				1	
	style guidelines.				1	*
	style guidelines.		n	LIINI	NV	
	AUTHORIZATION: Recommendation of Management		ľ	FNIII	Y	
	AUTHORIZATION. Recommendation of Hanagement		•	M 11011		1
X-11-14	News, Radio, and TV Releases	ALM	A+4yrs		₽	A+lyr
	Copies of news releases, scripts of radio and television	PJS				1
1	presentations. (Radio and TV materials are retained by SSG.)	SSG			-	
	Approximately 10 linear feet of paper and audiovisual material					
					l .	1

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APILE GUIDE AND RETENTION SCHEDULE

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tx-11-14 (cont.)	is stored in the work areas with a yearly accumulation of 3 linear feet. Offer to NARA when 25 years old.					
	AUTHORIZATION: BPA Records Schedule and Files Handbook PRI/1					
EX-11-15;	Publications					·
i filozofija	(a) Record copies of finished, BPA-numbered publications.	SSL	A+5yrs		P	A+lyr
* -5,14	Approximately 10 linear feet of paper files are stored	PJS	•			
	in the work areas with a yearly accumulation of 3 linear feet. Offer to NARA when 25 years old.					
	AUTHORIZATION: BPA Records Schedule and Piles Handbook OS/8					
_	(b) Camera copies of publications.	SSG	S			s
	AUTHORIZATION: GRS 13/1(b).					1
EX-11-16	Speeches	SSL	A+4yrs		P	A+lyr
	Copies of speeches by the Administrator and senior officials	PJS				
	that affect BPA program activities. Approximately 9 linear	ALM	_	1		
	feet of paper files are stored in the work area. Annual accumulation varies with an average of 2 inches per year.				1	1
:	Offer to NARA when 25 years old.					·
						1
	<u>AUTHORIZATION: BPA Records Schedule and Files Handbook PRI/1</u>	 		 	 	
	·				1	1

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See Section 900 8 for explanation of KEY terms.

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See Section MODA for explanation of KEY terms.

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! EXTERNAL ISSUES

AFILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN	STORA	GE	IN
		ALCOND	OFFICE	BPA	FRC	OFFICE
X-12	Permanent retention will permit documentation of BPA's					
(cont.)	efforts to uphold the constitutional rights of citizens					1
	for challenge and historical record.					
	Total constraints and modellour records				}]
X-12-11	Conferences/Symposiums	z	A+2yrs		8yrs	l a
	Planning, implementation, and evaluation of BPA sponsored	1		- H 10 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		
	or co-sponsored public conferences or symposiums.			*10 \$ 1 th 10		
	Published proceedings assigned BPA publication numbers					Ĭ
	are retained according to EX-11-15.					
			•	DEVIDI	MP	
	AUTHORIZATION: DOE 16/12(a)(3)(a)	1 1		PENIII	IVI	Į.
				7		1
X-12-12	Commendations/Criticism	2	3mos_			3mos
	Unsolicited comments from the public or other organizations					
1	on BPA activities including public involvement efforts and					
	programs, and other programs or policies for which a			ļ		
	request for comments is not issued.	+				
		1			ļ	
	AUTHORIZATION: GRS 14/7			.,	r :	
		\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \				•
X-12-13	Requests for Public Involvement/Understanding	ALP	A+5yrs	1		A+lyr
ł						
	(a) Proposals submitted to BPA by the public requesting					•
ł	BPA resources to further any public involvement process			1		1
	or public understanding of BPA programs and issues.					
	Includes funding requests (for example, intervenor					
	funding), sponsorships, and creation of working committees.	1				
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EX-8

AFILE GUIDE AND RETENTION SCHEDULE

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X-12-13	(b) Rejected proposals.	ALP	A+lyr			A+lyr	
•	<u>AUTHORIZATION</u> : Recommendation of Management			PEND	NC		
X-13	Public Information	AI.	5yrs		2	Atlyr	
	Material of formally designated information office relating		or S				
	to the creation and dissemination of information designed to		1	WITHDRAWN			
	help the public or an elected official Understand BPA programs	1				[
	and policies. May include confidential information.	 				1	
	AUTHORIZATION: GRS 14/2 as adapted for PERC		•		 		
	AUTHORIZATION: GRS 14/2 as adapted tot saw						
8x-13-11	Educational Activities	z	A+3yrs		}.	A	
	Material relating to cooperative educational programs and		_				
	projects with private groups, educational agencies and				l _		
	organizations, and State and other Federal agencies.	·		ULMUI	NP .		
				Privili	NI)		
	AUTHORIZATION: Soil Conservation Service (SCS) 260/13					1	
<u>x-13-12</u>	General Inquiries	7	3mos			3mos	
	Requests for information and responses to inquiries that						
	do not reference the Freedom of Information Act (FOIA)						
	and which are not affected by the Privacy Act.			1	1	1	
····	AUTHORIZATION: GRS 14/3 14/1						
		.					
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RMANENT Z - ORIGINATING OFFICE

See Section 8008 for explanation of KLY terms.

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AFILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN	STORAG	E	IN
		MECOND	OFFICE	BPA	FRC	OFFICE
3X-13-13	POIA Responses					
,	Responses to inquiries that cite the Preedom of Information Act (POIA). Responses include the original request and a copy of all material sent to the requestor.					
Singer .	(a) Responses granting access to requested records; responses to requests for nonexistent records; responses to requests with inadequate descriptions; and requests for which agency reproduction fee is not paid.	AL	A+lyr	lyr		A+lyr
	AUTHORIZATION: GRS 14/16(a)(1)5(2) GVS 14/11					
• •	(b) Responses denying, in part or total, access to requested records.	AL	A+lyr	4yrs		A+lyr
	AUTHORIZATION: GRS 14/16(a)(3) 14/1					
	(c) Appeals to BPA responses to FOIA requests.	AL	See Dispo	sition		A+lyr
	<u>Disposition</u> : Destroy 4 years after final determination by BPA or 3 years after final adjudication by courts, whichever is later.					
	AUTHORIZATION: GRS 14/17(a) /4//26			·		
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See Section 800 B for explanation of KLY terms

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Z - ORIGINATING OFFICE

See Section 800 B for explanation of KLY terms.

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AFILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN	STORA	GE	IN
			OFFICE	BPA	FRC	OFFICE
EX-13-14	Public Involvement Reading Room	ALP	-Syrs			A+1yr
	Documents relating to the development, operation, and			WITHDRAWN		
	services of the BPA Public Involvement Reading Room which					1
•	provides information to the public.					
	AUTHORIZATION: GRS 14/2 as adapted for PERC					
EX-13-15	Visitors	z	A+3yrs			A
	Visitor logs and other documentation of public visits		_			1
	including preparation, itineraries, tour arrangements,					1
•	and related correspondence.					
				DEVIDIY	lP	
•	<u>AUTHORIZATION:</u> Recommendation of Management			PENUIN	1):	
		·				l
EX-13-16	Congressional Hearings	ALG	A+lyr	4yrs		A+lyr
	Provisions for information for decisionmaking regarding					
	policy and issues conducted through congressional hearings					
	including background information, BPA formal testimony,					
	questions and answers, contract data and summary,					
	memorandums of understanding (MoUs), previous and pending					
	correspondence, and biographies.			PENDIN		
	AUTHORIZATION: Recommendation of Management			I LIIVII	TU'	
	AUTHORIZATION: Recommendation of Management					
EX-14	Special Events	z	A+3yrs			A
	Material for informational and honorary events, and					
	evaluations of their effectiveness. Includes preparation,					
	publicity, and participation. May include a variety of media.					
	AUTHORIZATION: Soil Conservation Service (SCS) 260/15					J
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EX-11

AFILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		IN	STORA	GE	IN		
			OFFICE	BPA	FRC	OFFICE		
X-15	External Relations Material relating to contacts and relationships with units of government and government officials; and other public or	AL	A+lyr	4yrs		A+lyr		
. 	private individuals, organizations, or groups. Includes agreements and memorandums of understandings. Does not include contracts or customer files. File alphabetically by name of group or individual.			PENDI	IG			
. *	AUTHORIZATION: Recommendation of Management							
x-15-11	Foreign Material relating to Governments, organizations, agencies,	z	A+lyr	4yrs	,	A+lyr		
	or individuals based outside the United States. <u>AUTHORIZATION</u> : Recommendation of Management			PENDI	NG:			
x-15-12	Federal Material relating to Governmental agencies; branches, or officials of the Federal Government; includes Congressional. File by name or agency, official, or committee.	ALG	A+lyr	4yrs	10	A+lyr		
	AUTHORIZATION: Recommendation of Management			PENUIT	VÜ			
K-15-13	State Material relating to agencies or officials of States. File by name of State and name of agency or individual.	ALG	A+lyr	4yrs		A+lyr		
	AUTHORIZATION: Recommendation of Management			LFUNIV				

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AFILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		IN	STORA	GE	. IN		
			OFFICE	8PA	FRC	OFFICE		
X-15-14	Municipalities	ALG	A+lyr	4yrs	,	A+lyr		
	Material relating to agencies or officials of cities.			4				
	File by name of city and name of agency or individual.			PENDI	V .			
	AUTHORIZATION: Recommendation of Management			LITUI	TU:			
x-15-15	Tribal	ALG	A+lyr	4yrs		A+lyr		
	Material relating to agencies or officials of American	`						
	Indian tribes. File by name of tribe and name of agency							
	or official.			DEVIDIR	ll.			
	AUTHORIZATION: Recommendation of Management			LEMAN	H)			
	Necommendation of Management				•			
X-15-16	Utility Organizations	2	A+lyr	4yrs		A+lyr		
	Material relating to utility groups and organizations such		_	_		_		
•	as public utility districts, utility cooperatives, private utilities, and direct service industries. Does not include			·				
	customer files.			AFMINIA	N.			
	•			Privilin	l D			
	AUTHORIZATION: Recommendation of Management				•	' \$1		
x-15-17	Industries	z	A+lyr	4yrs		A+lyr		
	Material relating to direct service industries and other					1-		
	industries. Does not include customer files.		•			İ		
				DENIIIN	H C.			
	AUTHORIZATION: Recommendation of Management	,		LFMnii	IU			

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See Section 800 8 for explanation of KEY terms

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EX-13

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			OFFICE	BPA	FAC	OFFICE
Ex-15-18	Northwest Power Planning Council	AR	A+lyr	4yrs	ļ	A+lyr
	AUTHORIZATION: Recommendation of Management			PENDI	IG.	
EX-15-19	Other Councils	A	A+lyr	4yrs		A+lyr
	Material relating to National, regional, and local councils.		•			
1.47	AUTHORIZATION: Recommendation of Management			PENDI	NG	
EX-15-20	Public Individuals, Groups, and Organizations	2	A+lyr	4yrs		A+lyr
DX-13-20	Material relating to groups, organizations, and individuals	"	V.TAT	4,71.8	'	A 11/1
	not associated with Federal, State, or local governmental bodies.					
				DENDI	ric .	
	<u>AUTHORIZATION</u> : Recommendation of Management		-	MENUI	NU	1
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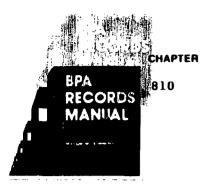
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See Section 800 Billion explanation of ELY terms

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FILE GUIDE AND RETENTION SCHEDULE

		OFFICE L	RETENTION PERIOD				
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN	STORAGE		IN '	
		NECOND	OFFICE	BPA	FRC	OFFICE	
FI	! FINANCE		See Dispos	ition		A+lyr	
• •	Material relating to the accounting and control of assets;					1	
	corporate risk insurance; capital acquisition, investment,				1		
	and management of these subjects; financial information;				ì		
•	and financial services such as payroll, collections,						
	disbursements, and trust agreements. Data may be recorded on						
	various media including paper, film, tape, disk, or diskette,			·			
•	unless otherwise specified in the narrative disposition.						
	differ officially specified in the native dispositions	1				,	
	Disposition:					Ì	
	In accordance with instructions for specific material						
1	described by the following related subjects.						
:						<u> </u>	
F1-11	Journal Vouchers	DSFO	A+lyr	2yrs	3yrs.	· · · · · · · · · · · · · · · · · · ·	
	The monthly registers of BPA's financial transactions.					,	
	AUTHORIZATION: GRS 7/2						
FI-11-11	Operations Accounting			-	}		
	Material relating to payment for BPA's goods and services.				1	1	
	(a) Purchase orders, receiving reports, and resords of	DSFO	4yrs				
	obligations & outlays and of material & supply. Records						
	are sent to Plant Investment Section (DSOP) at option			l		1	
	for incorporation in FI-12 records series.						
	AUTHORIZATION: BPA Records Schedule & Files Handbook FM-14		_				
			,	,		L	
	(b) Time-and-attendance cost detail reports	DSFO	-6mos	18mos		 	
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FILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE
1-11-11	AUTHORIZATION: GRS 7/1			<u> </u>		
(cont.)						
	(c) General ledger reports and detail ledger summary reports.	DSPO	A+lyr	6yrs		A
				 		
	AUTHORIZATION: RPA Records Schedule & Files Handbook BU=2(a)					
FI-11-12	Conservation Accounting	DSPO	A+6yrs			
	Material relating to payment for certain conservation					
	services. Includes receiving reports, invoices, loan					
	records, and related cost analyses and reconciliations.					
	See also CN-11, Conservation Marketing, and CN-12,			DEMINI	MI.	
	Conservation Programs.			LITUI	טוו	
	1					
1	AUTHORIZATION: FERC-18CFR-125.3/7(b)					
FI-12	Plant hassynting	DSOP	See Dispo	sition		A+lyr
F1-12	Plant Accounting Material relating to the fixed asset charges for allocation	000.	Dec Diope			
	of materials, equipment, and use related to electric plant					1.
	in service. Included are data on capital investment,					
	physical plant, work orders, and costs of specific locations					
	within the transmission system. See "Land" for real property					·
	details.					
*	Disposition					
	Disposition: In accordance with instructions for specific material				,	
•	described by the following related subjects.					
						•
						•
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RETENTION PERIOD

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A FILE GUIDE AND RETENTION SCHEDULE

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1-12-13	vouchers affecting general ledger accounts and original						
cont.)	Construction Project Authorizations (CPAs).			PENDI	IC		
	AUTHORIZATION: FERC-18CFR-125.3/39(a)&(b)			LIIDII	W.		
·	(b) Computer tape(s) enabling regeneration of FI-12-13(a)	DSOP	s				
*	constitute the continuing plant mortality data.			PENDIN	ır		
	AUTHORIZATION: FERC-18CFR-125.2(n)(5)			TENUIT	ID	ł	
I-13	Property Control	DSOP	A+lyr				
	Material relating to matters on property accounting, control,					1	
	and disposition of personal property owned or leased by BPA.						
	Personal property is portable, tagged or numbered,					I	
	nonexpendable, noninstalled equipment. Includes documents on						
	lost, damaged, and destroyed property; survey reports; and						
	financial details supporting the plant accounting activity.						
	See also SU-14, Materials Management, and SU-16, Supplies						
1	and Equipment.	•					
	AUTHORIZATION: GRS 6/5(a)			··	:	ŀ	
	NOTIFICAL SERVICES	 				,	
1-13-11	Property Relief Certificates	DSOP	TYPE			2yrs	
	Original copy of Form BPA 31 with unique control numbers.						
	Used to relieve property custodians of accountability.					\downarrow	
<u>-</u>	AUTHORIZATION: BPA Records Schedule & Files Handbook PM-2				•	+	
				·			
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RETENTION PERIOD

A FILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	OFFIC IN OFFICE	STORA	***	OTHER COPIES IN OFFICE
FI-12-11	Plant Record Ledgers					
1-12-11	Y Y					
i	(a) Hard copy ledgers of electric plant accounts including	DSOP	10yrs		40yrs	A+6mos
,	land and other fixed assets of BPA's system showing the cost by FERC class. Includes the property unit summary,				-	1
·	the Plant Investment Catalog, and the analyzed work orders.		4	TAIRL	in.	
•	See also ED-13, Work Orders.			PENDI	Nh	
	AUTHORIZATION: PERC-18CFR-125.3/30(a)		•			ļ
	(b) Computer tape(s) enabling regeneration of FI-12-11(a)	DSOP	S			
	constitute the continuing plant mortality data.				10	
	AUTHORIZATION: FERC-18CFR-125.2(n)(5)			PENDI	N6	
-12-12	Plant Construction Records	DSOP	10yrs			
	Details of costs collected in the work orders through		,		,	
	construction work-in-progress and supplemental/supporting				ļ	
:	documents used for analysis, reports, and studies.		:	A TAINI	NO.	
	AUTHORIZATION: FERC-18CFR-125.3/31			PENUI	Nb	
FI-12-13	Depreciation Summaries and Memorandum Adjustments					
i 1	(a) Hardcopy ledgers listing cost of plant retired by year	DSOP	10yrs		15yrs]
	installed and retired for mortality studies.					'
!	Computerization of depreciation expense of electric plant					ļ
•	includes adjustments to depreciation. Includes journal					
• · ·	· · · · · · · · · · · · · · · · · · ·					1

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A FILE GUIDE AND RETENTION SCHEDULE

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FI-13-12	Board of Survey Reports	DSOP	3vrs			lyr
	Original copy of Form BPA 27 with unique control numbers. Used to affix responsibility for lost, damaged, or destroyed property and/or approval disposal and property write-offs. Includes investigation reports and supporting documents. AUTHORIZATION: BPA Records Schedule & Files Handbook PM-13					
FI-13-13	Custodian Authorization Original copy of Form BPA 1280F. Used to establish and approve designation of BPA employees as property custodians.	DSOP	S			A
FI-13-14	AUTHORIZATION: BPA Records Schedule & Files Handbook PM-5 Custodian Account Audits Documents that track procedural compliance reviews, field trip investigations, and account spot-checks (site audits) for personal property custodians.	DSOP	¥4€ÅT8			2yrs
	AUTHORIZATION: GRS 6/1(a)					
FI-13-15	Personal Property Financial Control Reports Monthly subsidiary ledger reports.	DSOP	6yrs			
	AUTHORIZATION: FERC-18CFR-125.3/12(b)(1)			PEND	NG	. •

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	O IN OFFICE	FFICE	OF RECOR STORA BPA	·	OTHER COPIES IN OFFICE
1-13-16	Annotated Acquisition Documents Records of BPA's purchase orders, contracts, plant service requests, receiving reports, and other acquisition documents with annotations to include financial data about capitalized dollars, dates analyzed, serial numbers, and assigned BPA numbers.	DSOP	6yrs	P	NDIN	16	
	AUTHORIZATION: FERC-18CFR-125.3/12(b)(1)						. *
FI-13-17	Personal Property Accounting System Procedures Operating procedures for users of the automated property system and property management for custodians and Personal Property Managers. See also SU-14-16, Personal Property	DSOP	A				A
	Policy. AUTHORIZATION: FERC-18CFR-125.3/9(b)			PE	:NDIN	16	
9-14	Pinancial Statements	DSOS	_s				_s
	Material relating to the Federal Columbia River Power System's (FCRPS) financial statements and reports, such as the Program and Financial Summary.						·
	AUTHORIZATION: BPA Records Schedule & Files Handbook FM-47						
77-16	Records showing payment by the Government for goods and services rendered and BPA's assets, liabilities, revenues, and costs.						
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			OFFICE	BPA	FRC	OFFICE
R-13	Technical Reviews	SWR	3yrs	2yrs		3yrs
	Material relating to technical reviews of proposed hardware	1 1	•		1	
	and software systems or system components. Includes such				,	
	material as requirements and specifications, costs and			1	L	
	benefits of proposed systems, and justifications.			DEMUI	NV	
	,,	1 1		PENDI	M I	
	AUTHORIZATION: Soil Conservation Service (SCS) CRS/106			7		
** -						
1-14	Automated Systems Security	SWR	A+2yrs			λ
* 1	Material relating to security of ADP and related information					1
	management systems. Includes such material as authorizations			Į.		t
P	for computer center access, plans and procedures for physical	1				
	security, and security of data files and records. See also			OFMOU	JO.	1
	SS-18-13, Computer Security.			PENDI		
, E				ILIVII	ĮŲ	
,	AUTHORIZATION: Recommendation of Management					
R-15	Equipment Technology and Office Automation	SWR	3yrs	2yrs		3yr s
	Material relating to the selection, use, and management of	i I				
	ADP hardware and office automation equipment. Includes				}	
	material relating to equipment types, configurations, uses,					1
	and acquisition recommendations.		•			
				PEND	INC	
٠	AUTHORIZATION: Soil Conservation Service (SCS) CRS/106		•	renu	HVU	
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See Section 800 8 for explanation of KLY lerms

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INFORMATION RESOURCES

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APILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	ВРА	FRC	OFFICE
IR	INFORMATION RESOURCES		See Dispos	ition		Α
	Material relating to the development and implementation of					li .
	policy, standards, and procedures for information management					
	activities. Includes material relating to system software	, 1			j	
	and hardware, computer operations, telecommunications,					
	office automation, and library services. Throughout this					•
	subject, "ADP" means "automated data processing." Data may be	'	•			
	recorded on various media including paper, film, tape, disk, or				,	
	diskette, unless otherwise specified in the narrative disposition	n.				
•	Disposition: In accordance with instructions for specific			-		
	material described by the following related subjects.	,				
		,	•			
IR-11	Model Coordination	SWR	3yra	2yrs	ļ	Зугв
	Material relating to the coordination of analytical models.	1	,	·		
	May include material relating to intraagency and interagency					
•	coordination activities including workshops, reviews, and			PAINI	10	
	related data collection activities.	. 1	Į.	LNUI		
			T .	LIIVII	TU	,
	AUTHORIZATION: Soil Conservation Service (SCS) CRS/106					
IR-12	Systems Planning	SWR	3yra	2yrs		3yrs
	Material relating to the preparation, maintenance, and]]				•
	updating of information resources management plans and					
	chargeback systems. Includes material relating to					1
	coordinated planning efforts involving BPA and other					}
	Pederal, State, and local agencies.		U	LNIII		
				LIIUII	JU .	
	AUTHORIZATION: Soil Conservation Service (SCS) CRS/106					

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TPISH AND WILDLIPE

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APILE GUIDE AND RETENTION SCHEDULE

RETENTION PERIOD **OFFICE** OTHER COPIES OFFICE OF RECORD OF FILE CODE RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION STORAGE RECORD FAC OFFICE OFFICE (a) Inventory lists PW-21-12 (cont.) Disposition: At end of fiscal year in which inventory is superceded, transfer to PRC then destroy at end of 3 years. (b) Inventory cards Disposition: At end of fiscal year when tenant vacates property or when property is closed to tenancy or leaves BPA's control, transfer to FRC. Destroy at end of 6 years. (c) Agreements/Leases Disposition: At close of fiscal year in which either (1) agreement/lease terminates, lapses, or is cancelled or (2) litigation is concluded (whichever is later), transfer to FRC. Destroy at end of 6 fiscal years. AUTHORIZATION: DOE 15/1 See Disposition PJ PW-21-13 **Punding and Management Records** Includes all material related to O&M funding, such as cost and expense data for administration and operation. Case file by land unit or by facility. Disposition: Destroy 3 years after date of last entry. DOE 15/3 AUTHORIZATION:

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AFILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE
W-21-11	Pacility Maintenance	PJ	See Dispos	ition	ľ	λ
	Material relating to the operation and preservation of real				ļ	
_	property, including replacement of equipment and enforcement	}				
	of OaM agreements. Includes inspections, service and repair					
	records, and other activities to assert, protect, and					
	maintain BPA's interests in land. Case file alphabetically					
Ì	by land unit or by facility.			1 .00 . 18	1 1606	
				I MARK	基 4	
	(a) Summary card/ledger records reflecting service and repair	-				
*,					·	
1	Disposition: Transfer to PRC at close of fiscal year in					
75.	which unit is closed to tenancy or leaves BPA control and		Į.			
,	destroy at end of 3 years.		1	医温度医疗	19 A	İ
	(b) Inspection, service, and repair records.			ţ.		1
			_		110	
1	<u>Disposition</u> : Destroy 5 years after maintenance is performed.	1	ÿ.	FADI		
			i dige.	FIIDI	MU	
_ ·	AUTHORIZATION: DOE 15/2	•	i			
21-12	Agreements and Leases	PJ	See Dispos	ition		λ
	Material relating to policy and procedures for developing	1				
	and maintaining agreements and leases. Case file		او فرا	Mr. Baril	1.	
	agreements/leases and facility inventory records by land	į į	- € - 4	William)	₩.	
	unit or facility.					
	•	i		:		:
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		P4	STORAGE		104	
			OFFICE	BPA	FAC	OFFICE	
PH-20-12	(c) Construction files including final working drawings.				i		
(contr)	"as built" drawings, shop drawings, repair and alteration drawings, standard drawings, specifications, and related records.		WITHD	AWR		,	
	(1) Material selected for architectural, historical, and technological significance.		·				
	Disposition: Permanent. Offer to NARA when records are inactive.						
	(2) Material not included in Item 1 above.	1					
	Disposition: Dispose of when no longer needed for administrative purposes.		Til.	What the		·	
)	AUTHORISATION: 685 72/3		•	·			
PW-21	Real Property Management Material relating to the direction and supervision of the operation and maintenance (O&M) of real property. Includes	PJ	in the second se		-		
	but is not limited to: coordination with other entities; definition of objectives and performance standards; securing operation and maintenance performance; monitoring,		ં નાં ક	PRESIDENCE			
	evaluating, and reporting operational performance; and meeting administrative requirements. Use tertiary subjects and dispositions below for case files.						
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		en en	STORAG		. N
			OFFICE	BPA	FRC	OFFICE
PW-20-12	similar habitat, and passage improvements once installed			 		
(cont.)	or otherwise permanently placed where BPA does not acquire			1		
	or hold property interests. Case file by project, land					
	unit, or other appropriate category.					
			,			
	(a) Agreements and related material	- I - I	194	1 (4), (4)		
		1 1				1
	Disposition: Destroy 10 years after unconditional release					
	by BPA of conditions or restrictions.					
	AUTHORIZATION: GRS 3/2 3/14	1 1				
	WOLDONISMILON: OND 3/2 3/16			1		
	(b) Design files including preliminary and presentation	. 1				
	drawings.			1 1		
•	aransas.		4 2			
	(1) Material selected for architectural, historical, and		i ji	1.16 1 3 5 5 韓國		
ĺ	technological significance.					
	Disposition: Permanent. Offer to NARA within five years	+				
	after completion of project.		_			
	atter completion of project.		- W			
	(2) Material not included under Item 1 above.		1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		1
	in the standard disease a second disease					
	Disposition: Dispose of when no longer needed for			1		
	administrative purposes.					1
,			WITH	IDRAWN		
	AUTHORIZATION: CRS 22/1					
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CHAPTER

FISH AND WILDLIFE

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			OFFICE	BPA	FRC	OFFICE
W-20-11	(2) Material not included in Item 1 above.					
cont.)	•					
	Disposition: Dispose of when no longer needed for		WITHE	NWA		1
	administrative purposes.			1		
						1
	AUTHORIZATION: GRO 22/2-					
			,	il ali ii (a	l é	
	(c) Abstracts and certificates of title		*	. 18 € . J : #	<i>(</i>)	
	Disposition: Transfer to purchaser after unconditional sale					
	or release by the Government of conditions, restrictions,	,				
	mortgages or other liens.			1		
	2/16		•			1
	AUTHORIZATION: GRS 9/2 3/15			İ		
				1		
)	(d) All other material		,į	il er it	911.	
	Disposition. Manager to purchase of the property		Û	1 12 1 2 1 2 1	48	,
	Disposition: Transfer to purchaser after unconditional sale	\downarrow		i I		
	mortgages, or other liens.					
	moregages, or other frens.					
	<u>authorization</u> : grs 3/2 3/la				1	
	AUTHORIZATION: GRS 57 E Of Car					
rw-20-12	Class II Real Property	PJ	. See Dispos	11100		
W-20-12	Agreements and other material related to funding of	[_ ;	i		^
	vegetation, rip-rap, boulders, gravel, berms, weirs,		×	89 794]
	gabions, gravel recruitment structures, flow deflectors,		•	1		
	structures for stream pooling, fencing, culverts, and					
				1		J
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			OFFICE	8PA		·
W-20-11	(a) Design files including preliminary and presentation	- 				
sont.)	drawings.]. [
	(1) Material selected for architectural, historical, and		WITHE	RAWN		
1	technological significance.					
	Disposition: Permanent. Offer to NARA within five years	1 1				1
	after completion of project.		11.	4.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1		
3,.	(0) Matandal ant trade during than 1 shows		111	自并 不 如香蕉		
	(2) Material not included under Item 1 above.					* .
1	Disposition: Dispose of when no longer needed for			ļ		
•	administrative purposes.					
<i>,</i> ,				,		
	AUTHORIZATION: GRS 22/1					
	(b) Construction files including final working drawings,		+1 i	4.经验		İ
1	*as built drawings, shop drawings, repair and alteration	1	9 (R. \$	ाक्षण वर्षास्य स्व]
	drawings, standard drawings, specifications, and related			ŀ		
	records.	 				
	(1) Material selected for architectural, historical, and	, ,				
	technological significance.			_		
	Disposition: Permanent. Offer to NARA when records are		•			1
	inactive.					
			y 3 - 1	11-24-50		
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			OFFICE	BPA	FRC	OFFICE
W-19-20	<u>Hatcheries</u>	PJ	See PW-19	Disposit	ion	
W-19-21	Diets/Foods	PJ	See PW-19	Disposit	ion	
W-19-22	Pish Kills	PJ	See PW-19	Disposit	ion	
W-19-23	Diseases	PJ	See PW-19	Disposit	ion	
W-19-24	Pish Species	PJ	See PW-19	Disposit	ion	
W-19-25	Surveys and Census	PJ	See PW-19	D i a posi t	ton :	
W-19-26	<u>Statistics</u>	PJ	See PW-19	Disposit	ion	
W-20	Real Property Acquisition and Construction	_JDJ		,		
	Material relating to the acquisition of real property and the construction of fish and wildlife related facilities. Use the following tertiary subjects and dispositions.					
PW-20-11	Class I Real Property Material relating to land and improvements to land, such as fish propagation facilities, fish ladders, fish screens,	PJ	See Dispos	ition		A .
	and trap-and-haul facilities. Includes appraisals, title search documents, titles, easements, leases, permits, rights-of-way, cost share agreements, and related material. Case file by land unit and/or facility.			3 1 2	h c i ··································	
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			OFFICE	BPA	FRC	OFFICE
PW-19	Pish and Pisheries	PJ	•			ł
	Material relating to the identification, evaluation,					
	control, management, and ecology of fish species and habitats.			j.		
	Use the following tertiary subjects. Case file specific			,		
	projects at FW-17.	l				
	(a) Correspondence	1	3yrs	明 海绵		3yrs
•			-			
ž.	(b) All other material		S			S
	NUMBER CONTROL COLL CONTROL (CCC) CDC/75			DEMIN	MA	
	AUTHORIZATION: Soil Conservation Service (SCS) CRS/75	1 1		PHNII	INI	
PW-19-11	Habitat	PJ	See PW-19	Disposit	ion	
•			. مالله .			
PW-19-12	Passage	PJ	See PW-19	Disposit	ion	· .
PW-19-13	Migration	PJ	See PW-19	Disposit	i on	
FW-13-13	migration.		500 1 17		20	
PW-19-14	Transportation	₽J	See PW-19	Disposit	ion	
· •						
PW-19-15	Distribution	PJ	See FW-19	Disposit	10n	
FW-19-16	Requirements	PJ	See PW-19	Disposit	ion	·
	<u> </u>		, k	1 # 1		
FW-19-17	Population Management	PJ	See FW-19	Disposit	ion	
10 10	manada a]	Coo PW 10	D		
PW-19-18	Tagging	PJ	See FW-19	wisbosit	10n]
FW-19-19	Physiology	PJ	See FW-19	Disposit	ion	

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FISH AND WILDLIFE

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PW-17-14	Proposals	PJ	See PW-17-	ll Dispo	sition	ł
W-17-15	Approvals	PJ	See PW-17-	ll Dispo	sition	
°W-17-16	Evaluations	PJ	See PW-17-	ll Dispo	sition	
PW-18	<u>wildlife</u>	рJ				<u>.</u>
	Material relating to the identification, evaluation, control, management, and ecology of wildlife species and habitats. Included are records relating to diseases, effects of					
	drainage, pollutants, food and cover requirements. Case file specific facility/geographic projects at PW-17.		· •			
	(a) Correspondence		3yrs			3yra
	(b) All other material		s			s
	AUTHORIZATION: Soil Conservation Service (SCS) CRS/75		1	ENNI	NC	. `
PW-18-11	Wildlife Species	PJ	See PW-18	Disposit	10n	
W-18-12	Upland Habitat	PJ	See PW-18	Disposit	ion	
FW-18-13	Wetland Habitat	PJ	See PW-18	Disposit	ion	
?W-18-14	Rare and Endangered Species	PJ	See PW-18	Disposit	ion	
	Material relating to identification, control, management, and ecology of fauna and flora.]

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W-1.7	(1) Material selected for architectural, historical, and					
cont.)	technological significance.		WITI	IERAWN		
)	<u>Disposition</u> : <u>Permanent</u> . Offer to NARA when records are inactive.					
	(2) Material not included in Item 1 above.					
# .#	<u>Disposition</u> : Dispose of when no longer needed for administrative purposes.			-		
j.	AUTHORIZATION: GRG-62/9					
	(c) All other material.		A		7yrs	
	AUTHORIZATION: Recommendation of Management			MAIDI	NO .	
W-17-11	Requests	PJ		PENDI	Nb	
	(a) Correspondence		3yrs			3yrs -
	(b) All other material		S			s
	AUTHORIZATION: Recommendation of Management			PENDI	NG	
W-17-12	Cost Analysis	PJ	See PW-17	-11 Disp	osition	
W-17-13	Pinancing Alternatives	PJ	See PW-17	-11 Disp	osition	

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See Section 2002 for explanation of KEY terms

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PISH AND WILDLIFE

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<u> </u>	Protects/6tudies	LQ	See Dispos	ition_				
	Material relating to projects and studies including contract documents, evaluations, accounting records, bills, reports,	,						
	loss assessments, mitigation plans, implementation material		WITH	RAWN				
	and environmental documents. Case file numerically by project number. Use the following tertiary subjects.							
	(a) Design files including preliminary and presentation drawings.							
	(1) Material selected for architectural, historical, and							
	technological significance.							
	Disposition: Permanent. Offer to NARA within five years after completion of project.							
)	(2) Material not included under Item 1 above.							
	Disposition: Dispose of when no longer needed for administrative purposes.				11 4 7			
,	AUTHORIZATION: GRS 23/1							
	(b) Construction files including final working drawings, "as built" drawings, shop drawings, repair and alteration							
	drawings, standard drawings, specifications, and related		,					
				s (8i);	,			

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W-14-11	Management System	PJ	2yrs		5yrs	s
	Material relating to funding and equipment for water budget managers.					3
	AUTHORIZATION: Recommendation of Management			PENDI	NG	
W-15	Research and Monitoring Policy material. File specific research material at FW-17.	PJ				,
	(a) Correspondence		3yrs			3yrs
	(b) All other material		S			s
	AUTHORIZATION: Recommendation of Management			DENIDI	MO	
W-16	Consultants Material relating to consultants and consulting.	PJ	+0	LEMMI	10	
	File project/study material at PW-17.		in the second se	法 海囊子 化皮管胶管	š	
ł	(a) Correspondence		3yrs			3yra
	(b) All other material		S			s
	AUTHORIZATION: Recommendation of Management			PENDI	NG	<u>.</u>
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			OFFICE	BPA	FRC	OFFICE
PW-13 (cont.)	(a) Correspondence		3yrs			3yrs
(conct)	(b) All other material		S			S
	AUTHORIZATION: Recommendation of Management)	PENDI	NG	
PW-13-11	Mitigation Accounting	PJ	See FW-13	Disposit	ion	·
PW-13-12	Pish Mitigation	PJ	See PW-13	Disposit	ion	
PW-13-13	Wildlife Mitigation	PJ	See PW-13	Disposit	ion	
PW-13-14	Possible Liabilities Matertial relating to protection, mitigation, and enhancement actions.	PJ	See PW-13	Disposit	ion	
PW-13-15	Protected Northwest Streams Listing of streams	PJ	See PW-13	Disposit	ion	
PW-13-16	Pacific Northwest River Studies	PJ	See PW-13	Disposit	ion	
PW-14	Water Budget Material relating to streamflows for fish and wildlife benefit.	PJ	2yrs		5yrs	S
	<u>AUTHORIZATION</u> : Recommendation of Management			PENDI	NG	

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PW-11-12	Amendments Amendments to BPA's Pish and Wildlife Program and supporting material. Case file by amendment number.	PJ	S+2yrs	PENNIN	5yrs N	S
₩ -1 2	AUTHORIZATION: Recommendation of Management Pish and Wildlife Compensation Material relating to compensation for fish and wildlife losses.	PJ	S+2yrs	n Liveri	5yra	s
W-12-11	AUTHORIZATION: Recommendation of Management BPA Compensation Plan and Policy	рJ	S+2yrs	PENUII	5yrs	s
W-12-12	AUTHORIZATION: Recommendation of Management Lower Snake River Compensation Plan AUTHORIZATION: Recommendation of Management	рJ	S+2yrs	PENDIN	5yrs	s
W-13	AUTHORIZATION: Recommendation of Management Protection/Mitigation/Enhancement Material relating to the protection, mitigation, and enhancement of fish and wildlife species and habitats. Use the following tertiary subjects. Case file specific project material at PW-17, Projects/Studies; acquisition and construction material at FW-20, Real Property Acquisition and Construction; and property management material at PW-21, Real Property Management.	₽J		PENDIN	G	

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FISH AND WILDLIFE

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A PILE GUIDE AND RETENTION SCHEDULE

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FW	PISH AND WILDLIPE		See Dispos		 	A+lyr
: W	Material relating to fish and wildlife resources, policies,		, Dec Diopot		1,	
	and issues. Data may be recorded on various media including				'	
	paper, film, tape, disk, or diskette, unless otherwise					
	specified in the narrative disposition.					
			&			i
	Disposition: In accordance with instructions for specific					
	material described by the following related subjects.		£			
	A Mariana Andrea of Mariana Andrea of Mariana Andrea of Mariana of					1.
	AUTHORIZATION: Recommendation of Management All retentions in this series that are by *Recommendation					
	of Management are justified as follows: (a) to document					
	requirements of the Pacific Northwest Power Planning and					
	Conservation Act, Public Law 96-501, 94 Statute 2697-2736		÷ .			
	and the 1984 Columbia River Basin Fish and Wildlife					•
	Program (as amended); and (b) and because of potential				ļ	
	challenge of contracts and land acquisition.				}	
PW-11	BPA Fish and Wildlife Program	РJ	S+2yrs		5yrs	s
	Case file by Northwest Power Planning Council's Plan					
	sections. File Council's Fish and Wildlife Program under				LIA O	
	the primary subject "External Issues."			PENU	INI.	
				LIIU	JIV	
	AUTHORIZATION: Recommendation of Management					
PW-11-11	Implementation Work Plans	РJ	S+2yrs		5yrs	s
	Work plans and background material, case filed by year.					
				EVIDI	NC	1
	AUTHORIZATION: Recommendation of Management		T.	LIVUI	10	1

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S SUPERSEDED/OBSOLFTE

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Z. ORIGINATING OFFICE

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A FILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA	VGE	_ IN
			OFFICE	BPA	FRC	OFFICE
FI-28	Revenue Requirements Material relating to total costs which BPA must recover through its rates, such as interest, amortization, and operating expenses. See also PM-13-13, Wholesale Power Rate;	DRFR	A+5yrs			A
· v'	PM-13-14, Transmission Power Rate; and PM-16, Rate Filings and Hearings.			PENDA	MC.	
- 	AUTHORIZATION: Recommendation of Management			LITUI	TU	
FI-29	Repayment	DRFR	A+5yrs			A
)	Material relating to BPA's methods, practices, and balances owed the U.S. Treasury to repay the Government for its investment in the Federal Columbia River Power System (FCRPS). Includes repayment policy formulation and studies, adequacy of proposed rates pursuant to FERC regulations, alternative repayment methodologies, and interest and amortization payment studies on the effects of program or policy changes on revenue requirements. See also PM-13-13, Wholesale Power Rate; PM-13-14					·
	Transmission Power Rate; and PM-16, Rate Filings and Hearings. <u>AUTHORIZATION</u> : Recommendation of Management			PEND	Nb	
				·		
	·		•			
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		RECORD	OFFICE	-	STOR/ BPA	FRC	OFFICE
PI-26-17	PMIS Change Control	DSPD		22	re		
	Material relating to requests for PMIS changes, new segment			WITHDRAY			
	values, system development, and system enhancements as			WITHDRAY	/N		
	recorded on form BPA 1827 or 1827A.			OLY	IN	MU -	
		·					
	AUTHORIZATION: Recommendation of Management. See FI-26.	 	· · · · · · · · · · · · · · · · · · ·				
PI-27	Average System Cost	DRE	A+6yrs			1	,
- - -	Material relating to the Residential Purchase and Sale		"""				I "
•	Agreement (RPSA) and the Exchange Transmission Credit						
,	Agreement (ETCA). Includes records about utility rate-change	ĺ	İ				
	proceedings and Record of Decision (ROD) signed by the BPA						1
	Administrator. Average system cost (ASC) methodology documents		•				j
	(as outlined in 18 CFR 301) constitute a highly specialized			-			ı
	exhibit to contracts with BPA's customers. (Hardcopy documents						
	are microfilmed and destroyed 90 days after completion of the						
	microfilm quality check. The microfilm constitutes the				•		1
	official record.)			PEN		M	
			, i	TLI	W	טח	1
	AUTHORIZATION: FERC-18CFR-125.3/7(b)						1
PI-27-11	Residential Exchange Invoicing	DREF	A+lyr			5yrs	
	Material relating to BPA's Residential Exchange Program.					3725	1 "
*	Includes original load audits, revised Exhibit C to						
	Appendix I of Residential Purchase and Sale Agreement (RPSA)						1
	and Exchange Transmission Credit Agreement (ETCA) contracts,						Ī
	and supporting documents. See also PM-11-14, Contracts,] i		DEM	MA	ll I	
	Original and Master Authenticated, and FI-17, Vouchers.			PEN	Uh	H	1
	AUTHORIZATION: FERC-18CFR-125.3/7(b)					-	」 .

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AUTHORIZATION: PERC-18CFR-125-3/7(b)

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1-26-14	PACS Prent End	DSFD	Α	2yrs		
	Material relating to the "front end" portion of the Planning, Accounting, and Control System (PACS), including: change control procedures; segment value and other tables; Detail Ledger, Front-End, and FTE reports; report distribution and processing programs; data and parameter			ITII BRAWN		
	files reformatter; data conversion; and special year-end procedures AUTHORIZATION: Recommendation of Management. See FI-26.			PENDI	16:	
1-26-15	PACS General Ledger Material relating to development and implementation of the "general ledger" portion of the Planning, Accounting, and Control System (PACS), including: the Walker GL	DSPD	. W	2yrs Th dr awn		A
	accounts; metasets; management and Walker control reports; budget system; budget entry; forecast versus actual reports; and organizational and program hierarchies. AUTHORIZATION: Recommendation of Management. See PI-26.		ř	PENDIA	G	
PI-26-16	ADP Resource Management Reporting System Material relating to development of the subsidiary ledger system to the PACS system, including EDS status reports, task orders, and submittal calls with instructions to IMAG	Z	A	2yrs		A
<u>.</u>	members. AUTHORIZATION: Recommendation of Management. See FI-26.			PENDI	NG	

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A FILE GUIDE AND RETENTION SCHEDULE

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F1=26	cycle. The review cycle is based on general husiness	İ				
(cont.)	practices and BPA management's experience with integrated database systems and the life cycle of automated hardware and software.		WINT	BRAWN		
FI-26-11	PMTS Accounts Payable Material relating to development and installation of the Walker Accounts Payable and Purchase Order system that	DSPD	A (TIW	2yrs IDRAWN		A
	supports the invoice approval and processing requirements of BPA's general vouchering activity.			ENDI	NG	
FI-26-12	AUTHORIZATION: Recommendation of Management. See FI-26. PMIS Internal Controls Material relating to establishing standards for performing assessments, implementing improvements, and providing internal and external reports related to internal control responsibilities and activities of the Office of Financial	DSF	A W	2yrs		Α
	Management. Includes requests for PMIS changes, new segment values, system development, and system enhancements. AUTHORIZATION: Recommendation of Management. See FI-26.			ENDI	NG	
FI-26-13	PMIS A-127 Material relating to the establishment of FMIS objectives and standards, implementation directives, and related review	DSF	A W	ZY & S THORAWA		A
	and assessment reports as directed by OMB Circular A-127.	·	•	ENDI	NG	
	AUTHORIZATION: Recommendation of Management. See FI-26.		<u> </u>			<u> </u>

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			OFFICE	BPA	FRC	OFFICE	
FI-24-11	Risk Identificiation	DRFA	λ	•		Α	i
•	Documents that track BPA's analysis of its exposure to loss						
	and available alternatives, including direct exposure and						
	exposure acquired through contracts and agreements.			PENDIN	H?		
		'		Traili	H)		
	AUTHORIZATION: PERC-18CFR-125.3/20(a)]		, 5,,,,,,,			i
				ĺ	}	1	1
≎ p i –25	Cost Analyses	DRBO	3yrs		7yrs	Α	i
4	Material relating to the allocation and distribution of	DSFO		· ·			
;	BPA's overheads and cost pools and to the rates associated				1		
	with the overheads and cost polls. See FI-12 for continuing					1	i
l	plant mortality data.						٠
•				DEMNIA			
i !	AUTHORIZATION: PERC-18CFR-125.3/31(f)						
-RI-26	Pinancial Management Information System	DSA		2yrs			
	Material relating to all financial information for the	DSF		WITHDRAWN	}		
	Financial Management Information System (PMIS). Includes	i	•	Militare			
ì	manual and automated accounting; managerial, budgetary, and					1	
1	program management information processing; and reporting.			5' 5			
1	See IR-23, Computer Applications, for technical ADP development			## 1 p 1 4	1		
1	material.			ľ			
	AUTHORIZATION: Recommendation of Management]	1 .	
	The retention period for the FI-26 series (including its			OEMINI	NO .		
	tertiary subjects) is justified as follows:			4(1)	VII	i	
	The Financial Management Information System (PMIS) was				10	1	
•	developed with major review points at 10-year intervals.						
	The active life of the materials will be the 10-year						
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA	••	IN OFFICE	
			OFFICE	BPA	FRC ,	UFFICE	
PI-23	Revenue and Receipts	DSOG	A+lyr_	2yrs	2lyrs	<u> </u>	
	Material relating to data on BPA's revenues and receipts					1	
	from all sources; also, material relating to issues about				Į		
	general procedures and practices related to BPA's billings						
	to customers for power, residential exchange, and related						
	services. Includes contract compliance, timely processing						
	of payments, penalty charges, and interest charges. See	\vdash					
	also PM-11-19, Billings.						
· ·							
	AUTHORIZATION: SPA Records Schedule & Files Handbook FM-1(h)	1			 		
		,					
FI-24	Risk Management						
	(a) Material relating to all aspects of risk management as it	DRPA	Α			1 ^	
	relates to BPA's internal matters. Includes commerical						
•	insurance policies purchased by BPA, participation in nuclear					,	
	insurance pools, certain self-insured and uninsured risks,	,				j	
v	Washington Public Power Supply System insurance program,						
	Trojan Nuclear Power Plant insurance, and brown/black-out	,		AFRICA			
	insurance.			PENDI	MĽ		
				I LITUI	110		
•	AUTHORIZATION: PERC-18CFR-125.3/20(a)				_		
i		DRFA	3yrs	Зуrs		3yrs	
	(b) Material relating to amounts recovered from insurance	DKLY	Jyrs	JAIR	,	Jyrs	
	policies due to losses and other claims by BPA and financing	`					
	of both property and liability loss exposure.			DEMON	IO		
				H-VIIII	MI.	1	
	AUTHORIZATION: FERC-18CFR-125.3/20(c)			I LITUI	TU		
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FI-21-12	(b) Other related documents except those specified in (c).	DRFA	S				
(cont.)	AUTHORIZATION: PERC-18CFR-125.3/58(a)&(b)		• ·	PENDI	NG	ļ	
	(c) Material relating to financial planning for BPA's borrowing of funds from the U.S. Treasury for work and services provided by BPA. See also BU-14-15, Associated	DRFA	A+3yrs		3yrs	A	ļ
₹	Agencies' Resource Requirements.	ļ		PENNIN	IC .		
:	AUTHORIZATION: FERC-18CFR-125.3/7(a)			Limi	IV		
FI-21-13	Cash Flow Material relating to projections and historical data about	DSOG	A+5yrs		5yrs	Α	1,
•	BPA's cash position.			OFMON	in		
!	AUTHORIZATION: FERC-18CFR-125.3/61(a)			PENUI	b		
F I - 22	Credit Management Material relating to BPA's debt management and collection activities.	·					
i	(a) Collection documents	DSOG	A+lyr		4yrs	A	
	AUTHORIZATION: FERC-18CFR-125.3/12(b)(2)		i	PFNNI	NG		
	(b) Other related documents	DSOG	S				
	AUTHORIZATION: BPA Records Schedule & Files Handbook FM-48						
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FI-20-14	Reimbursements Material relating to financial planning for reimbursements received by BPA from outside entitites for work and services provided by BPA. AUTHORIZATION: FERC-18CFR-125.3/7(a)	DR	A+3yrs	PENDI	3yrs	A+lyr
FI-21	Cash Management Material relating to overall BPA cash concerns, including short-term forecasting and dealings with the U.S. Treasury. AUTHORIZATION: FERC-18CFR-125.3/58(a)&(b)	DSOG DRPA	: s	PENDIN	6	A
FI-21-11	Banking Material relating to BPA's banking, lockboxes, and wire transfer arrangements.	DSOG	A+2yrs		,	
FI-21-12	AUTHORIZATION: FERC-18CFR-125.3/59(c) Treasury Borrowing Material relating to BPA's investment policies and to the sale of BPA bonds and notes to the U.S. Treasury for the purpose of funding BPA's capital programs.			PENDI	16	
	(a) Bonds and their background data <u>AUTHORIZATION</u> : FERC-18CFR-356.11/6	DRFA	A+6yrs	PENDI	NG	A

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FI-19-22	Insurance Deductions	DSDP	3yrs :	ļ;		
	Material relating to health insurance deductions. Includes		1 美	1、1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1		ļ
	reports, vouchers, and schedules.					1
į.	2120			 	ļ	ļ
	AUTHORIZATION: GRS 2/27 2					
FI-20	Non-Treasury Financing	DRPA	A+3yrs		3yrs	A+lyr
	Material relating to non-Treasury sources of credit, funds,		, , , , , , , , , , , , , , , , , , ,	1 100000 11		1
•	or other-than-traditional (alternative) sources of funds for		4	The state of the] .
	work and services provided by BPA. (Traditional sources of					
	funds are Treasury borrowing (PI-21-12); reimbursements from					
	outside entities (FI-20-14); and revenues from power sales			1 %		1
	and wheeling agreements (FI-23).)			LHOR	in	1
			· .	4-NIII	W.	
	AUTHORIZATION: FERC-18CFR-125.3/7(a)		·	PIIDII	TU	1
	No. The same Pieces in Name in the same	DR	A+3yrs		3yrs	.*
r1-20-11	Non-Treasury Pinancing Negotiations		ATOYLO (والمراجع المراجع المراجع المراجع المراجع المراجع المراجع المراجع المراجع المراجع المراجع المراجع المراجع المراجع	3713	1
	Material relating to development of BPA's financing contracts.		1 5	有老品和明白商具	:	l .
	Contracts.		n	CAIDIA	in	1
	AUTHORIZATION: FERC-18CFR-125.3/7(a)		ľ	THIN	lla	1
	No. House and the second secon		•	CITOIT!		1
FI-20-12	Non-Treasury Financing Implementation	DR	A+3yrs		3 yrs	
	Material accounting for BPA's financing contracts with	1	,	1		1
	sources other than the U.S. Treasury.					
				IL NIIII	W.	
	AUTHORIZATION: FERC-18CFR-125.3/7(a)			LITUII	713	I

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FI-19-19	Payroll Schedules	DSDP	3vrs			
	Material relating to schedules used in the payroll process. Includes U.S. Treasury and non-Treasury schedules.		•			
FI-19-19	ADPHORIZATION: GRS 2/16(a) Payroll Administration Reports Material relating to statistical and narrative reports about payroll operations and pay.	DSDP	3yrs			
FI-19-20	AUTHORIZATION: GRS 2/17(b) Taxes Material relating to withheld Pederal taxes, such as Internal Revenue Service Form W-3. Includes reports	DSDP	4yrs			
	relating to income and Social Security taxes. AUTHORIZATION: GRS 2/18(b)&(c)	DSDP	3yrs			
FI-19-21	Retirements Material relating to employees' accrual of retirement credit. Includes reports, registers, and control documents. AUTHORIZATION: GRS 2/21/ml 2 [Ca		-7	p x z x k	i de la la la la la la la la la la la la la	
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19-13	Bond Durchases	DSDD	- 34£8	· · · · · · ·	1:	
	Material relating to deposits and purchases of U.S. savings bonds.	;	•			1
	savings bonds.				ļ	
	AUTHORIZATION: GRS 2/7					
FI-19-14	Payroll Processing	DSDP	lyr	2yrs		
	Material relating to payrolls, check lists, earnings and	1				
7	leave reports, and related certification sheets.					ł
	AUTHORIZATION: GRS 2/13(b)(1)	1				1
	AUTHORIZATION: GRS 2/13(D/(S)					
FI-19-15	Payroll Processing Final Edit	DSDP	3yrs			
	Comparative report of time-and-attendance data and payroll		_			
	master record for DOE's Payroll and Personnel System (PAY/PER	₹\$).				
	AUTHORIZATION: GRS 2/3(a)					
:	AUTHORIZATION: GRS 2/3(a)					
FI-19-16	Payroll Control Registers	DSDR	3yrs			1
1	Material relating to control totals and values used for	1		*	'	
	payroll balancing and reporting.					
·	AUTHORIZATION: GRS 2/14					,
FI-19-17	Payroll Changes	DSDP	3yrs			
F1-19-17	Payroll adjustments.	0001	3,10			
ļ						
	AUTHORIZATION: GRS 2/15(a)	-		 	 	
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Payrell Operations	DSDD	See Dispos	ition	ļ	<u>lyr</u>	
for personal services performed for BPA. See also PE-30, Pay			:			
Disposition: In accordance with instructions for specific					,	
,						
Individual Accounts	DSDP	See Dispos	ition	· ·		
Material relating to employee earnings, deductions, and						
leave by pay period, quarter, and pay year.						
Disposition: Transfer at end of each pay year to National			4,			
Personnel Records Center, St. Louis, MO. Destroy 56 years				ĺ	1	
after date of last entry.						
	1				`	
AUTHORIZATION: GRS 2/1			•			
	'					
Employee Payroll Folders	DSDP	A+2yrB	lyr	1		
Material relating to each employee, including personnel					ľ	
actions (SF-50s), W-4s, voluntary deduction authorizations,				_	,	
garnishment authorizations, and special leave authorizations.					_	
				'		
18(a), and 23.				 		
					1	
The same of the sa	Disposition: Transfer at end of each pay year to National Personnel Records Center, St. Louis, MO. Destroy 56 years after date of last entry. AUTHORIZATION: GRS 2/1 Employee Payroll Folders Material relating to each employee, including personnel actions (SF-50s), W-4s, voluntary deduction authorizations,	Payroll Operations Material relating to salary disbursements to BPA employees for personal services performed for BPA. See also PE-30, Pay Administration. Disposition: In accordance with instructions for specific material described by the following related subjects. Individual Accounts Material relating to employee earnings, deductions, and leave by pay period, quarter, and pay year. Disposition: Transfer at end of each pay year to National Personnel Records Center, St. Louis, MO. Destroy 56 years after date of last entry. AUTHORIZATION: GRS 2/1 Employee Payroll Folders Material relating to each employee, including personnel actions (SF-50s), W-4s, voluntary deduction authorizations, garnishment authorizations, and special leave authorizations. AUTHORIZATION: GRS 2/4(a)(2)6(b)(2), 8(b), 10(b), 11(a),	Payroll Operations Material relating to salary disbursements to BPA employees for personal services performed for BPA. See also PE-30, Pay Administration. Disposition: In accordance with instructions for specific material described by the following related subjects. Individual Accounts Material relating to employee earnings, deductions, and leave by pay period, quarter, and pay year. Disposition: Transfer at end of each pay year to National Personnel Records Center, St. Louis, MO. Destroy 56 years after date of last entry. AUTHORIZATION: GRS 2/1 Employee Payroll Folders Material relating to each employee, including personnel actions (SF-50s), W-4s, voluntary deduction authorizations, garnishment authorizations, and special leave authorizations. AUTHORIZATION: GRS 2/4(a)(2)6(b)(2), 8(b), 10(b), 11(a),	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION Payroll Operations Material relating to salary disbursements to BPA employees for personal services performed for BPA. See also PE-30, Pay Administration. Disposition: In accordance with instructions for specific material described by the following related subjects. Individual Accounts Material relating to employee earnings, deductions, and leave by pay period, quarter, and pay year. Disposition: Transfer at end of each pay year to National Personnel Records Center, St. Louis, MO. Destroy 56 years after date of last entry. AUTHORIZATION: GRS 2/1 Employee Payroll Folders Material relating to each employee, including personnel actions (SF-50s), W-4s, voluntary deduction authorizations, garnishment authorizations, and special leave authorizations. AUTHORIZATION: GRS 2/4(a)(2)5(b)(2), 8(b), 10(b), 11(a),	Payroll Operations Material relating to salary disbursements to BPA employees for personal services performed for BPA. See also PE-30, Pay Administration. Disposition: In accordance with instructions for specific material described by the following related subjects. Individual Accounts Material relating to employee earnings, deductions, and leave by pay period, quarter, and pay year. Disposition: Transfer at end of each pay year to National Personnel Records Center, St. Louis, MO. Destroy 56 years after date of last entry. AUTHORIZATION: GRS 2/1 Employee Payroll Folders Material relating to each employee, including personnel actions (SF-50s), W-4s, voluntary deduction authorizations, garnishment authorizations, and special leave authorizations. AUTHORIZATION: GRS 2/4(a)(2)s(b)(2), 8(b), 10(b), 11(a),	



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FILE GUIDE AND RETENTION SCHEDULE

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04-15-80 DOE/NARA

		OFFICE		RETENTIO	N PERIOD	_ ,
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	OFFIC IN OFFICE	E OF RECORD STORAG	_	OTHER COPIES IN OFFICE
		-	,		*****	0.7.52
[1-18-11	TEA Supporting Documents	 		+		
	(a) The prescribed form, such as SF 71, used to record leave used by the employee, except as specified below.	Z	3yrs			
	AUTHORIZATION: GRS 2/8(b)					
	(b) The document used to approve and record <u>advanced</u> sick leave (Form BPA 543), <u>advanced</u> annual leave (SF 71), and <u>extended</u> (over 80 hours) leave without pay (SF 50).	DSDP	3yrs	1		lyr
	AUTHORIZATION: GRS 2/8(b)					
	(c) The document, such as SF-71, used to authorize the use of sick or annual leave or compensatory time in the pay period immediately before termination of employment.	DSDP	3yrs			lyr
	AUTHORIZATION: GRS 2/8(b)					
	(d) Time Books, sign-in/sign-out sheets, credit hour logs, and other documents that record employees' attendance (hours of work), including flexitime/flexischedule documents.	Z	3yrs			
	AUTHORIZATION: GRS 2/3(b)					
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A FILE GUIDE AND RETENTION SCHEDULE

		OFFICE	RETENTION PERIOD_					
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	OFI IN OFFICE	FICE OF RECOR	mar.	OTHER COPIE IN OFFICE		
F1-15	(a) General ledgers	DSOG	2yrs	3yrs	45yrs	_A		
(cont.)	AUTHORIZATION: FERC-18CPR-125.3/10(a)(1)			PENNI	NC			
	(b) Subsidiary ledgers BPA Records Schelule + Files Hondbook FM-2	DSOG	2yrs	ULVIDIO	Myra	A		
	AUTHORIZATION: PERC_100PR-125.3/10(a1(1)(2)			FFNIII	l l)			
FI-16	Treasury Schedules	DSDG	lyr	lyr	4yrs	A.		
	Records showing checks authorized by BPA to be issued by the U.S. Treasury as payment for specific vouchers. See also	DSDT						
	FI-19-18, Payroll Schedules, and FI-21-13, Cash Flow.			OTAIDH	10			
	AUTHORIZATION: FERC-18CFR-125.3/14(a)		·	PENUIT	lb			
-17	Vouchers	DSDG	lyr	lyr	4yrs	А		
	Records that authorize expenditures and that convey entries to the general ledger. See also LA-13, Title and Payment,							
	LA-15, Maintenance Trees, and SU-12, Routine Procurements.			ATMINI				
	AUTHORIZATION: PERC-18CFR-125.3/15			PENUI	Nb			
1-18	Time and Attendance Reporting	DSDP	2mos	34mos		6mos		
,	The prescribed document (BPA 1718/M) that records the hours							
	of work and leave (time and attendance, or T&A) for each BPA							
	employee. See also PE-32, Attendance and Leave.	+						
	AUTHORIZATION: CRS 2/3(a)(1)6(2)							

INPORMATION RESOURCES

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A FILE GUIDE AND RETENTION SCHEDULE

			RETENTION PERIOD					
		OFFICE	OFFK	OFFICE OF RECORD				
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN	STORA	VGE .	IN		
		NECUMD	OFFICE	BPA	FAC	OFFICE		
R-16	Telecommunications Material relating to request for and assignment of radio frequencies, use, and restriction; use of commercial cable, teletype, telex, and similar services; use of the Federal Telephone System (FTS) and commercial telephone service; facsimile and other electronic communications equipment; directory listings; and electronic transmission of text or data originating from ADP (including word processing) equipment. See also SS-12, Mail Services. AUTHORIZATION: Soil Conservation Service (SCS) CRS/111	SWH	A (PENDI	VG .	A		
	(a) Logs of long distance telephone calls kept by some originating organizations for certifying bills. See also FI-17, Vouchers. AUTHORIZATION: GRS 12/3(a)	2	6mos			6mos		
	(b) Material other than logs relating to a specific telecommunication function, activity, person, organization, location, or project. Case file by name or number. AUTHORIZATION: Soil Conservation Service (SCS) CRS/111	2	À	PENDI	NG	^		

A - ACTIVE

P - PERMANENT

S SUPERSEDED/OBSOLETE

* FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

Z - ORIGINATING OFFICE

See Section 800-8 for explanation of KLY terms \sim

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APILE GUIDE AND RETENTION SCHEDULE

		OFFICE OF RECORD	RETENTION PERIOD					
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		OFFICE OF RE			OTHER COPIES		
FILE CODE			iN .	STORA				
			OFFICE	BPA	FAC	OFFICE		
IR-17	Database Management Material relating to establishing and managing resource and management information in organized databases. Includes material relating to the storage of automated data and the retrieval and use of such data using automated database management techniques. Case file material for a specific	SWS	3yrs	2yrs		Jyrs		
	database, program, or other management aspect, as needed. <u>AUTHORIZATION</u> : Soil Conservation Service (SCS) CRS/106 & GRS	20		PENDI	NC .			
R-18	Software Development Material relating to the development, maintenance, and use of ADP software (computer programs). Includes material relating	sws	3yrs	2yrs		3yrs		
	to the design and programming of automated systems and the use and applicability of ADP software. <u>AUTHORIZATION</u> : Soil Conservation Service (SCS) CRS/106			PENDI	IG			
R-19	Computer Operations Material relating to the operation of ADP and associated equipment. Includes standard operating procedures, recommended maintenance schedules, and vendor training in equipment operation and maintenance.	SWH	3yrs	2 yrs	· · · · · · · · · · · · · · · · · · ·	Зугв		
	equipment operation and maintenance. Also includes records of maintenance performed on ADP (including telecommunications) equipment. <u>AUTHORIZATION</u> : Soil Conservation Service (SCS) CRS/106			PENDI	VG			

A - ACTIVE

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A - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

Z - URIGINATING OFFICE

See Section 800 8 for explanation of KEY terms.

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AFILE GUIDE AND RETENTION SCHEDULE

		OFFICE P				
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD		ICE OF RECORD STORAGE		OTHER COPIES
PILE CODE	NECOTING GETTERS TITLE, DESCRIPTION, MILE DIG. CONTON		IN OFFICE	BPA	FRC	OFFICE
IR-20	Computer Center See tertiary subjects below.	SWH				Зугв
(R-20-11	Operations Material relating to BPA's computer center's operations and services. AUTHORIZATION: Soil Conservation Service (SCS) CRS/106	SWH	3yrs	PENDI	VG	3yra
IR-20-12	Liaison Material relating to operation of non-BPA computer centers, such as those operated by the Department of Energy, other Federal agencies, State agencies, and universities. Includes material relating to equipment, operating systems, access procedures, fee schedules, and training material specifically related to an individual computer center. AUTHORIZATION: Soil Conservation Service (SCS) CRS/106	SWE	3yra ,	PENO.	NG	3 y rs
IR-21	Computer Assistance Material relating to BPA's computer-related Information Center's operations and services. AUTHORIZATION: Recommendation of Management	SWU	3yra ,	2yra PENDI	NG	Зугв

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See Section 1000 for explanation of KEY forms

P - PERMANENT

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Z - ORIGINATING OFFICE

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APILE GUIDE AND RETENTION SCHEDULE

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approximation of the second of the second			OFFICE		, rns.	OFFICE .
R-22	Resource Proposals	SWR	A .	2yrs		λ
	Requests for computer-related hardware and for software					
	applications. Includes all documentation for data processing,			Ì		
	word processing, office automation, and telecommunication			APHOL	חוו	
	requests. Case file by organization, equipment, or program.			PHNIII	N	
				FILL	774	
	AUTHORIZATION: Recommendation of Management		1 6 °			
	Annual of Annual Control of the Cont	2	* : - 2uzo	2yrs	•	3yrs ·
R-23	Computer Applications		3yr a	2715		331.8
	Material relating to all computer applications. Includes the planning, budgeting, development, maintenance, operation					
	and management of each application. NOTE: Office of Record			ł		
	is often SWS.		_			
	18 Often Sws.			BEAIDIA	ll	
	AUTHORIZATION: Recommendation of Management		3		1	1
			•			
R-24	ADP Coordination	2	Зугв	2yr a		Зугв
	Material relating to providing coordinated ADP services.					
	NOTE: Office of record is often SWS.			DEMON	10	
			•	h-viii	NI.	
	AUTHORIZATION: Recommendation of Management		-	i riini	TU.	
						•
R-25	Library Services	SSL	A			S
	Material relating to the ordering of any publication.		af,	1,		
			•	1 (8) (1 m)		
	AUTHORIZATION: Recommendation of Management			REMINI	10	
				h-viii	M.	
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FILE GUIDE AND RETENTION SCHEDULE

FILE CODE		OFFICE -	RETENTION PERIOD					
	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF	OFFIC	CE OF RECORD		OTHER COPIE		
			IN	STORAGE		IN		
			OFFICE	BPA	FRC	OFFICE		
L A	LAND Material relating to the appraisal, condemnation, and acquisition of land or rights and to permits and agreements relating to the use of land. Data may be recorded on various media including paper, film, tape, disk, or diskette, unless		See Dispo	osition	र्जें प ्र	A+lyr		
	otherwise specified in the narrative disposition. Disposition: In accordance with instructions for specific material described by the following related subjects.							
. A-11	General Project Management Material relating to general project management, project plans, and estimates.	MMLA	s	PENDI	ML .	Α .		
•	<u>AUTHORIZATION</u> : Recommendation of Management			LADI	NU			
A-11-11	Project Plans Material relating to broad project plans and negotiations covering multiple segments of a transmission line project.	MMLA	s D i	ENDIN	e.	A		
	AUTHORIZATION: Recommendation of Management			TUNIN	U			
A-11-12	Project Estimates Estimates prepared on a project basis showing the anticipated cost of land acquisition.	MMLA	s			٨		
	AUTHORIZATION: Recommendation of Management		7	HNUIN	6			
					l ·			

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S - SUPERSEDED/OBSOLETE See See tool 800 8 for explanation of KEY terms

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FILE GUIDE AND RETENTION SCHEDULE

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FILE CODE		OF	OFFICE OF RECORD			OTHER COPIE		
FILE CODE		RECORD	IN	STORAGE		IN		
			OFFICE	BPA	FRC	OFFICE		
-12	Appraisal	MMLA	S			A		
	Material relating to the appraisal of unacquired land rights.					1		
	See LA-14, Land Acquisition, for approved original report.			AFNID	110			
				PEND				
	<u>AUTHORIZATION</u> : Recommendation of Management			I LITU	ITU			
					_	1		
A-13	Title and Payment	MMLA	S			A		
	Material relating to general title and payment for land.							
				PENDI	V P			
	AUTHORIZATION: Recommendation of Management			TERUN	M	1		
•								
A-13-11	Real Property Title	MMLA	S	İ		A		
	Material relating to the title to land.			OFLIBIA	10			
		! !		PENDI				
i	<u>AUTHORIZATION</u> : Recommendation of Management			LIIVII	TU			
	•			1				
-13-12	Real Property Payment	MMLA	S			A		
•	Material relating to payment for land. See also FI-17,							
	Vouchers.		4	PAIDIA	ın	1 .		
			2	가시내기				
	AUTHORIZATION: Recommendation of Management			LIIVII	IU .			
				1		<u> </u>		
<u></u>	Land Acquisition	A.IMM	See Disp	OBITION		 		
	Case files pertaining to land acquisition for transmission			.				
	line facilities. Includes original legal conveyance	!		1 1				
	instruments, title policies, General Counsel's final opinion,					1		
	appraisals, and related data. A microfilm copy of the			+				
	records is maintained in the Office of Record for its							
						I		

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FILE GUIDE AND RETENTION SCHEDULE

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LIEE CODE	neconds series title, description, and disposition	RECORD	IN	STOR	AGE	in in
			OFFICE	BPA	FRC	OFFICE
A-14	convenience on an as-needed basis not to exceed the official					
control	retention period.					
						1
	Disposition: Maintain hardcopy records at BPA during the			1	ĺ	1
	acquistion process. At the conclusion of the acquisition			ļ		, ,
	process, records are microfilmed. Hardcopy and archival					
	microfilm are sent to the Federal Records Center (FRC) for	1		l		
	contingent retention. PRC retains documents as long as BPA	1			1	
	retains use of the land. When land is transferred away from				ì	
	BPA's use, certain appropriate documents are transferred to	↓ I	3	•		
	the new owner. Residual documents are retained at PRC. BPA]		
	reviews residual records held by PRC 10 years after transfer					
	of property.	1			_	
I		1 1				+_
	AUTHORISATION: NARG-letter dated July 26, 1983. GAS 3/la-6	 			ļ	
,		1			1	I
A-15	Maintenance Trees	MMLA	lyr	lyr	4yrs	A
	Material relating to the acquisition of operations and		-		1	
·	maintenance "danger" trees, including vouchers. See also			APILO	MA	1
	PI-17, Vouchers.			PENDI	MI.	
	·			ILITUI	IVU	1
	AUTHORIZATION: FERC-18CFR-125.3/15	1	•	7	-	ľ
						•
A-16	Disposal and Release of Easement	MMLA	S		ļ ·	Α
	Material related to BPA and GSA policies and procedures				,	
	about the disposal of land and land rights no longer needed			deus	110	
1	for BPA transmission facilities.	1		PENDI	NI.	ł
				I LITUI	ITU	
	AUTHORIZATION: Recommendation of Management]			[ļ

A - ACTIVE P - PERMANENT

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PILE GUIDE AND RETENTION SCHEDULE

{		OFFICE P	RETENTION PERIOD					
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF		CE OF RECORD		OTHER COPIES		
1.22 0002	1	RECORD	IN	STORAGE		IN		
			OFFICE	BPA	FRC	OFFICE		
A-16-11	Disposal	MMLA	_See LA-14	Disposi	tion			
	Material related to the disposal of land and land rights no longer needed for BPA transmission facilities. Portions of these records are merged into LA-14, Land Acquisition, at the conclusion of the disposal process. AUTHORISATION: NARS letter dated July 26, 1983			·				
LA-16-12	Release of Easements Material documenting release of real property. Portions of	MMLA	See LA-14	Disposi	ion	Α.		
,	these records are merged into LA-14, Land Acquisition, at the conclusion of the release process.			j i sway	· · · · · · · · · · · · · · · · · · ·			
	AUTHORIZATION: NARS letter dated July 28, 1983		•					
LA-17	Land Management Material relating to rights granted others to use BPA lands held in fee or easement.	MMLA	See Dispo	sition		λ		
	Disposition: Maintain hardcopy records at BPA during the acquistion process. At the conclusion of the acquisition process, records are microfilmed. Hardcopy and archival microfilm are sent to the Pederal Records Center (PRC) for contingent retention. FRC retains documents as long as BPA retains use of the land. When land is transferred away from BPA's use, certain appropriate documents are transferred to the new owner. Residual documents are retained at PRC. BPA							

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See Section 800 8 for explanation of KE interiors

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Z - ORIGINATING OFFICE

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FILE GUIDE AND RETENTION SCHEDULE

		OFFICE		RETENTIO	N PERIOD	
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF	OFFICE OF RECORD			OTHER COPIES
THE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORAGE		. IN
			OFFICE	BPA	FRC	OFFICE
LA-17	reviews residual records held by PRC 10 years after transfer	ļ				
(cont.)	of property.				٠.	, ·
	AUTHORIZATION: NARS letter dated July 26, 1983. GRS 3/6-5					
LA-17-11	Outgrants Material relating to land use agreements about permission	MMLA	See LA-17	Dispos	tion	Α
	to use rights-of-way.					
	AUTHORIZATION: NARS letter dated July 26, 1983					
LA-17-12	Leases Material relation to outlesses of DD mediates	MML7	See LA-17	Disposi	tion	A
	Material relating to outleases of BPA real estate.	<u> </u>				
	AUTHORIZATION: NARS letter dated July 26, 1983					
LA-17-13	Land Trust Agreements	MMLA	See LA-17	Dispos	tion	A
	Material relating to record copy of trust agreements.			Dispos	1011	
	AUTHORIZATION: NARS letter dated July 26, 1983			·		
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Z - ORIGINATING OFFICE

See Section 800 8 for explanation of KLY terms

BPA RECORDS MANUAL

CHAPTER

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AFILE GUIDE AND RETENTION SCHEDULE

		OFFICE OF RECORD	RETENTION PERIOD					
FILE CODE	BECORDS SERVES TITLE DESCRIPTION AND DISPOSITION		OFFICE OF RECO		D	OTHER COPIE		
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		iN	STORAGE		, in		
		ILCOILD	OFFICE	BPA	FRC	OFFICE		
	LAW Material relating to interpretation of law, litigation, legislation, and related activities. Data may be recorded on various media including paper, film, tape, disk, or diskette, unless otherwise specified in the narrative disposition. Disposition: In accordance with instructions for specific material described by the following related subjects.		See Dispo	sition	1章宝	A+lyr		
W-11	Legal Services Interpretations of law and related analyses and recommendations as they pertain to BPA programs and Offices. (a) Cases determined by DOE to have a significant effect on a statute, regulation, or rule; or having attracted intense public interest. Case filed by program or Office. Approximately 150 linear feet of paper files are stored off-site and approximately 45 linear feet are stored in the work area with a yearly accumulation of 20 linear feet.	AP	A+lyr ;	SY 99 LIN	P	A+lyr		
	Material is organized by case title. Offer to NARA in 5-year blocks when 20 years old. AUTHORIZATION: DOE 26/9(a)&(b) (b) Other cases.	AP	A+lyr	PENDII 5yrb	AXES.	A+lyr		
	AUTHORIZATION: DOE 26/9(e)		-	ENDIN	lG			

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APILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	NECONDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA		IN OFFICE		
	· ·		OFFICE	8PA	FRC			
W-12	Litigation	AP	See Dispos	ition				
	Legal action or process reflecting all aspects of litigation proceedings and documenting General Counsel actions taken in protecting the interest of BPA and the Pederal government. Filed alphabetically by name of action. Disposition: In accordance with instructions for specific material described by the following related subjects.	` ;	WITHE	RAWN				
W-12-11	BPA Litigation in which BPA is a party.			.				
	(a) Cases determined by DOE to have a significant effect on a statute, regulation, or rule; or having attracted intense public interest. Approximately 300 linear feet of paper files are stored off-site and approximately 30 linear feet are stored in the work area with a yearly accumulation of 15 linear feet. Material is organized by case title.	AP		5yrs DRAWN DEAIDI	MC	A+lyr		
	Offer to NARA in 5-year blocks when 20 years old. AUTHORIZATION: DOE 26/9(a)&(b)			ENDI	10			
	(b) Other cases.	AP	A+lyr	5yrs	4yrs	A+lyr		
···	AUTHORIZATION: DOE 26/9(e)			PHDI		k		
				ENUI	NU			
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						1		

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Z - ORIGINATING OFFICE

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D DOE/NARA

AFILE GUIDE AND RETENTION SCHEDULE

	•	OFFICE	RETENTION PERIOD					
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE	OFFICE OF REC			OTHER COPIES		
PILE CODE	neconds series title, description, and disposition	RECORD	IN	STORAGE		- IN		
	`		OFFICE	BPA	FRC	OFFICE		
LW-12-12	Non-BPA							
	Litigation in which BPA is not a party but has an interest.							
	(a) Cases determined by DOE to have a significant effect	AP	A+lyr	5yrs	P	A+lyr		
	on a statute, regulation, or rule; or having attracted			ļ	1	1		
,	intense public interest. Approximately 1 linear foot of	1 1		WITHERAWN	ļ			
	paper files are stored in the work area with an annual	1			ļ			
	accumulation of 2 linear inches. Material is organized			1		J .		
[by case title. Offer to NARA in 5-year blocks when 20			OFILE	40			
}	years old.	j j		PENDI	MI.	•		
	, and the second	-L :		ILIIDI	ĮĮŲ			
	AUTHORIZATION: DOE 26/9(a)&(b)							
	303 20/ 7(4/4/5/			_		I		
)	(b) Other cases.	AP	A+lyr	5yrs	Ayrs	A+lyr		
	(b) Other Cabes	AF .	ATIYL	JA L.B	AVES	ATIYL		
•	AUTHORIZATION: DOE 25/9(a)			DEMON	מנו			
	ing the data of the same of th			PFMIII	W.			
LW-12-13	Potential	AP	A+lyr	1/1/201		A+lyr		
	Issues that may result in litigation.	1		4315	l	1		
	100000 that may result in literyactons					1		
	AUTHORIZATION: Recommendation of Management	,		DELIDI		I		
]	Mornowia in the Commence of the Hartagement			h-VIIII	W."			
LW-12-14	Torte			LITUII	TU	•		
	Material relating to any wrongful act, damage, or injury				 	- 		
	done willfully, negligently, or in circumstances involving				}			
L	breach of contract, for which a civil suit can be brought.				 	 		
T	manner of vondendor, toe wireding a verse base can be be outlined.							
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See Section 800.8 for explanation of KLY fears.

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Z - ORIGINATING OFFICE

APILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	DECORDS SERIES TITLE DESCRIPTION AND DISPOSITION	OFFICE	OFF	ICE OF RECO	OTHER COPIES			
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STOR	AGE	IN IN		
			OFFICE	BPA	FRC	OFFICE		
W-12-14	(a) Cases determined by DOE to have a significant effect	AP.	A+lyr_	5yrs	P	A+lyr		
cont.)	on a statute, regulation, or rule; or having attracted intense public interest. Approximately 5 linear feet of paper files are stored off-site and approximately 25 linear feet are stored in the work area with a yearly accumulation		V	VI) H DRAWN				
	of 5 linear feet. Material is organized by case name. Offer to NARA in 5-year blocks when 20 years old.			PENDI	NG			
	AUTHORIZATION: DOE 26/9(a)&(b) (b) Other cases.	AP	A+lyr	į̇̃5yrsį	4yrs	A+lyr		
	AUTHORIZATION: DOE 26/9(e)			PENDI	NG			
₩-13	Legislative Actions Material pertaining to legislation, draft legislation, testimony, bills; reports; and opinions pending before Congress and state legislatures concerning BPA as a Pederal power agency. Approximately 15 linear feet of paper files are stored off-site and approximately 30 linear feet are stored in the work area with a yearly accumulation of 3 linear	AP	A+lyr W	5yrs ITHDRAWN	P	A+lyr		
	feet. Material is organized by title and legislative number. Offer to NARA in 5-year blocks when 20 years old. AUTHORIZATION: FERC II/III(1)			PENDI	VC			

A - ACTIVE

See Section 800-8 for explanation of KEY terms.

x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

P - PERMANENT Z - ORIGINATING OFFICE S - SUPERSEDED/OBSOLETE

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04-15-8 DOE/NAR

APILE GUIDE AND RETENTION SCHEDULE

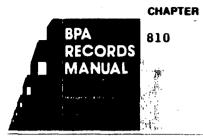
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			OFFICE	BPA	FRC	OFFICE		
W-13-11	Pending Legislation	AP	A+lyr	4yrs		A+lyr		
	Bills, reports, statements, hearings, abstracts, and							
	other material relating to legislation prior to enactment.			druni	110			
				NFWIII	MI."	i		
	AUTHORIZATION: Recommendation of Management		•		TU	1		
			4	11111111111111111111111111111111111111	.			
W-14	Patents and Copyrights	Z	See Dispo	sition		A+lyr		
	Material relating to patents and copyrights obtained for	b						
	BPA products. Material will be transferred to Office of	1						
	the General Counsel upon its request.	.						
	Disposition: In accordance with instructions for specific				}			
	material described by the following related subjects.							
<u>-14-11</u>	Patents	z	A+lyr	ن ا	5yrs	A+lyr		
	Technical and legal material relating to patents and			e shabah	4			
	pending patents on BPA developments. Formerly included	*.	,	' 				
	in ED-12-11. Office of Record is usually AN.		•	arumil	ĮΛ	I .		
		}		?FNIII	1	1		
	AUTHORIZATION: 35 United States Codes (USC), paragraph 286			LILDIN				
W-14-12	Copyrights	z	A+lyr		2yrs	A+lyr		
	Technical and legal material relating to copyrights							
	on BPA-developed material.					·		
	AUTHORIZATION: 17 United States Code (USC), paragraph 507(b)			DEVIDI	NO			
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A - ACTIVE
P - PERMANENT

KEY

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P - PERMANENT Z - ORIGINATING OFFICE S - SUPERSEDED/OBSOLETE



T MAINTENANCE

P MA-1

D 04-15-88
DOE/NARA

AFILE GUIDE AND RETENTION SCHEDULE

MAINTENANCE Material relating to the maintenance of the power system. Data may be recorded on various media including paper, film, tape, disk, or diskette, unless otherwise specified in the	OFFICE OF RECORD	OFFICE OFFICE See Dispos	OF RECORI STORA BPA ition		OTHER COPIES IN OFFICE
MAINTENANCE Material relating to the maintenance of the power system. Data may be recorded on various media including paper, film,		OFFICE	8PA		OFFICE
Material relating to the maintenance of the power system. Data may be recorded on various media including paper, film,	,			THE .	
and Alice Office 141					A+lyr
Disposition: In accordance with instructions for specific material described by the following related subjects.		. :	·		
Substation Maintenance	мм	See Dispos	ition		Ls
Material relating to maintenance of specific substations. Includes data about substation equipment and its performance.	хD	,			
<u>Disposition</u> : <u>Destroy</u> when related equipment is disposed. <u>AUTHORIZATION</u> : BPA Records Schedule & Files Handbook MA-16(a)					
Equipment and Materials Material relating to the equipment and material used for the maintenance of substations and non-electric plants	MM XD	See Dispos	ition		S
Also used for equipment performance and failure. Disposition: Destroy when related equipment is disposed.				The second secon	
AUTHORIZATION: BPA Records Schedule & Files Handbook EMP-4					
				1. 编制。	
	Material described by the following related subjects. Substation Maintenance Material relating to maintenance of specific substations. Includes data about substation equipment and its performance. Disposition: Destroy when related equipment is disposed. AUTHORIZATION: BPA Records Schedule & Files Handbook MA-16(a) Equipment and Materials Material relating to the equipment and material used for the maintenance of substations and non-electric plants. Also used for equipment performance and failure. Disposition: Destroy when related equipment is disposed.	MM Substation Maintenance Saterial relating to maintenance of specific substations. Ancludes data about substation equipment and its performance. Disposition: Destroy when related equipment is disposed. AUTHORIZATION: BPA Records Schedule & Files Handbook MA-16(a) Equipment and Materials Material relating to the equipment and material used for the maintenance of substations and non-electric plants. Also used for equipment performance and failure. Disposition: Destroy when related equipment is disposed.	MM See Dispos Authorization: Beatroy when related equipment is disposed. Authorization: BPA Records Schedule & Files Handbook MA-16(a) Equipment and Materials MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos MM See Dispos The maintenance of substations and non-electric plants. Also used for equipment performance and failure. Disposition: Destroy when related equipment is disposed.	MM See Disposition Disposition: Beatroy when related equipment is disposed. AUTHORIZATION: BPA Records Schedule & Files Handbook MA-16(a) MM See Disposition MM See Disposition AUTHORIZATION: BPA Records Schedule & Files Handbook MA-16(a) MM See Disposition MM See Disposition MM See Disposition MM See Disposition MM See Disposition MM See Disposition Disposition: Destroy when related equipment is disposed. Disposition: Destroy when related equipment is disposed.	MM See Disposition Disposition: Destroy when related equipment and material used for the maintenance of substations and non-electric plants. Also used for equipment performance and failure. Disposition: Destroy when related equipment is disposed.

x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

Z - ORIGINATING OFFICE

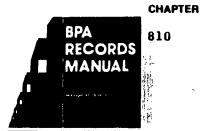
AFILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE
MA-12	Transmission Line Maintenance	MM	See Dispo	eition		<u>s</u>
	Material relating to the maintenance of transmission lines such as equipment used, wood poles, towers, line upgrades.	хD				
	Disposition: Destroy when 5 years old except where legal					i
	action is involved or reasonably anticipated.					
	AUTHORIZATION: BPA Records Schedule & Piles Handbook MA-3(a)					— .
MA-12-11	Right-of-Way Maintenance	им -	S+3yrs			S
	Material relating to the maintenance of rights-of-way	ХD		·		
	including access roads, encroachments, vegetation	l		1		•
•	management, and clearing. See also LA-15, Maintenance Trees. AUTHORIZATION: Recommendation of Management			PENDI	NG	·
MA-13	-Power System Control	MM -	S+2vrs			_s
	Material relating to the planning, programming, testing,	KD.				
	and maintenance of the PSC function of the electrical and					
	nonelectrical facilities. Includes general equipment	:	•]		Į.
	files which are not specific to a brand or location.		•			
				+	-	2
	AUTHORIZATION: BPA Records Schedule & Files Handbook MA-4(a)			 		
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A - ACTIVE P - PERMANENT x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

Z - ORIGINATING OFFICE S - SUPERSEDED/OBSOLETE

See Section 8008 for explanation of KEY terms



MAINTENANCE

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APILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	8PA	FRC	OFFICE
4A-13-11	PSC Communications Equipment	MM	S+2yrs			s
	Material relating to equipment <u>specific</u> to support the PSC program to a particular budget or account number. AUTHORIZATION: BPA Records Schedule & Files Handbook MA-4(a)	жD	•			
4A-14	System Protection Maintenance	мм	S+2yrs			s
-	Material relating to the planning, programming, testing, and maintenance for the SPM function of the electrical and nonelectrical facilities.	ХD	2.5,100	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		
IA-14-11	AUTHORIZATION: BPA Records Schedule & Files Handbook MA-4(a) SPM Equipment	мм	S+2yrs			s
	Material relating to system protection maintenance.	nn	5+2 y t 8	The state of the s	No b	
	AUTHORIZATION: BPA Records Schedule & Files Handbook MA-4(a)				*	
N-15	System Maintenance Information System	мм	S+2yrs			 s
	Material relating to the System Maintenance Information	хD	WITH	DRAWN	Ì	
	System (SMIS).			DEAID	NO	
	AUTHORIZATION: Recommendation of Management			rtnui	Nb	
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x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

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AFILE GUIDE AND RETENTION SCHEDULE

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		OFFICE	BPA	FRC	OFFICE
Maintenance Improvement and Efficiency Activities Material relating to studies, analyses, and actions taken to improve the reliability of the equipment of the power system. Includes studies to streamline administrative and maintenance work procedures and procedures to ensure that equipment is not over- or under-maintained. Also includes steps for implementation of employee suggestions related to maintenance of the power system.	MM	A+5yrs	PENNI	NG	A
AUTHORIZATION: Recommendation of Management	MM	N. Evra			
O&M Data Collection Studies Material realting to streamlining administrative requirements for field personnel.	nn	BIYCHA	DENDI	NG	
AUTHORIZATION: Recommendation of Management			1 FIIDI) TU	,
Maintenance VerTeam Studies Studies by the Vertical Teams about specific subjects related to the power system.	MM	A+5yrs			A
AUTHORIZATION: Recommendation of Management			PEND	NG	;
			,		
	Maintenance Improvement and Efficiency Activities Material relating to studies, analyses, and actions taken to improve the reliability of the equipment of the power system. Includes studies to streamline administrative and maintenance work procedures and procedures to ensure that equipment is not over- or under-maintained. Also includes steps for implementation of employee suggestions related to maintenance of the power system. AUTHORIZATION: Recommendation of Management Ohm Data Collection Studies Material realting to streamlining administrative requirements for field personnel. AUTHORIZATION: Recommendation of Management Maintenance VerTeam Studies Studies by the Vertical Teams about specific subjects related to the power system.	Maintenance Improvement and Efficiency Activities Material relating to studies, analyses, and actions taken to improve the reliability of the equipment of the power system. Includes studies to streamline administrative and maintenance work procedures and procedures to ensure that equipment is not over- or under-maintained. Also includes steps for implementation of employee suggestions related to maintenance of the power system. AUTHORIZATION: Recommendation of Management Ohm Data Collection Studies Material realting to streamlining administrative requirements for field personnel. AUTHORIZATION: Recommendation of Management Maintenance VerTeam Studies Studies by the Vertical Teams about specific subjects related to the power system.	Maintenance Improvement and Efficiency Activities Material relating to studies, analyses, and actions taken to improve the reliability of the equipment of the power system. Includes studies to streamline administrative and maintenance work procedures and procedures to ensure that equipment is not over- or under-maintained. Also includes steps for implementation of employee suggestions related to maintenance of the power system. AUTHORIZATION: Recommendation of Management Ohm Data Collection Studies Material realting to streamlining administrative requirements for field personnel. AUTHORIZATION: Recommendation of Management Maintenance VerTeam Studies Studies by the Vertical Teams about specific subjects related to the power system.	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION Maintenance Improvement and Efficiency Activities	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION Authorization: Recommendation of Management

A - ACTIVE

P - PERMANENT

S - SUPERSENED/OBSOLETÉ

x. FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

Z - OHIGINATING OFFICE



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CHAPTER

TMAINTENANCE

P MA-5

04-15-88 T DOE/NARA

A PILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE		
A-16-13	Performance Level Guides Guidelines (PLGs) for performing maintenance on power system equipment. Includes multiyear statistics; intervals for routine and preventive maintenance; and technical data, procedures, schedules, and recommendations.	ММ	A+5yrs	PENDI	NG	A		
· .	AUTHORIZATION: Recommendation of Management					·		
A-17 SPIPs	SPIPs	мм	A+5yrs			Α		
	Material relating to the standards, procedures, instructions,							
•	and information (SPIPs) for maintaining the power system. Includes indirect maintenance subjects such as grounding	·						
•	and removal of storage tanks.			PENDING				
	<u>AUTHORIZATION</u> : Recommendation of Management		#	1 Fires				
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See Section 8008 for explanation of REY terms

P - PERMANENT

S - SUPERSEDED/OBSOLETE

x - FIRST LETTER IN AREA OFFICE HOUTING (L. T. U. W)

BPA 810
RECORDS
MANUAL

T MANAGEMENT

MN-1

04-15-88 DOE/NARA

A FILE GUIDE AND RETENTION SCHEDULE

		OFFICE -	RETENTION PERIOD					
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			IN OFFICE	STOR/	NGE FRC	IN OFFICE		
MN	MANAGEMENT Records accumulated by individual organizations that relate to internal administrative activities rather than the functions for which the organization exists. Data may be recorded on various media including paper, film, tape, disk, or diskette, unless otherwise specified in the narrative disposition. Disposition: In accordance with instructions for specific material described by the following related subjects.		See Dispo	sition		A+lyr		
MN-11	Organization	- SM	A+5yro	1	P	<u>s</u>		
	Organizational charts and reorganization proposals. Approximately 1 linear foot of paper files are stored in the work area with an accumulation of 1 linear inch per year. Offer to NARA in 5-year blocks when 20 years old. AUTHORIZATION: (AS 16/13/2)		WITE	PRAWN		·		
MN-12	Position Management Material dealing with the use made of positions in performing an organization's mission. Includes studies relating to design of efficient organization framework including position design, planning and tracking of staffing levels, and staffing cost controls. Approximately 1 linear foot of paper files are stored in the work area with an accumulation	SM	A+5yrs W	THORAWN	P (s		
				· • · · · · · · · · · · · · · · · · · ·	i a s _i ,			

A - ACTIVE
P - PERMANENT
S - SUPERSEDED/OBSOLETE

x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

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T MANAGEMENT

G 04-15-88

MN-2

A PILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORAGE		in	
	'		OFFICE	BPA	FRC	OFFICE	
MN-12	of two to three folders per year. Offer to NARA in 5-year					The state of the s	
(cont.)	blocks when 20 years old. See also BU-11-16, PTE and MURS Systems Reports.						
	AUTHORIZATION: GREATE/Detal.						
MN-13	Activity Reports Periodic (monthly) reports of work in progress reflecting	. Z	2yrs	lyr		λ	
	activities, status, and accomplishments.			DEMINI	NO		
· ·	AUTHORIZATION: DOE 16/8(b)(1)(a)		•	LEMAI	NV		
NN-14	Manuals/Handbooks	 		ishi .			
,	Formal directives distributed as circulars, handbooks, or in manual form announcing changes to BPA policies and procedures. Case file by issuing organization (which is the Office of Resord).				A 3 41		
	(a) Issuances and background material related to BPA	z	A+lyr W	THORAWN	P	s	
	program functions. Accumulation of material varies throughout the agency. Offer to NARA in 5-year blocks when 20 years old.						
	AUTHORIZATION: CRS-16/14a)		_	5			
,	(b) Issuances and background material related to such administrative functions as travel, procurement, and budget.	2	S	10000000000000000000000000000000000000	4/10 %	S	
	AUTHORIZATION: GRS 16/1(c) 16/4						
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A - ACTIVE
P - PERMANENT
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See Section BOOM for explanation of KLY territy.

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T MANAGEMENT

04-15-88 DOE/NARA

A PILE GUIDE AND RETENTION SCHEDULE

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		RECORD	IN	STORAGE		IN
			OFFICE	BPA	FRC	OFFICE
4N-15	Long Range Goals and Strategic Choices	λ	λ+5yrs			A
	Material relating to multiyear program direction and plans,	z				
	including their development and implementation. Includes					
ر. وي د د	intra-agency memorandums of understanding (MoUs) and memorandums of agreement, unless filed by function or			OFLIBI	10	1
بتعقب	subject as specialized correspondence.			PENDI		
	aubject as specialized collespondence.			1 Pilni	441	
	AUTHORIZATION: Recommendation of Management				, i	·
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MN-15-11	Annual Management Plan	A .	A+5yrs			A
	Records pertaining to the manner in which specific BPA				·	1
the second	organizations propose to implement BPA's strategic choices		•			
	and objectives in a given period. This Plan is submitted					
	yearly to the Department of Energy.			DEMINI	MO	1
	AUTHORIZATION: Recommendation of Management			PENDI	NA	
	AUTHORIZATION: Recommendation of Hanagement			7 51101	740	
MN-16	Management Analyses/Studies	`				
	Management improvement, evaluation, and cost-reduction				}	1
	activities. Does <u>not</u> include inspections and audits.			hek.b	1	1
	Approximately 1 1/2 linear feet of paper final reports are			Mr. Bai	A BY IS	
	stored in the work area with an accumulation of 1/2 foot				1	
	annually. Offer to NARA when 25 years old.				ĺ	
	(a) Final report.	SM	A+5yrs		P	A+lyr
						1
	(b) Working papers.	SM	A+5yrs			A+lyr
	AUTHORIZATION: BPA Records Schedule and Files Handbook ADM-4					
(A ACTIVE		L	·		<u> </u>	.1

P - PERMANENT S - SUPERSEDED/OBSOLETE x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

See Section 800 B for explanation of REY terms.

Z - ORIGINATING OFFICE

MANUAL

04-15-88 DOE/NARA

A PILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE		
N-16-11	A-76 Review			1		Ĭ		
	An examination, evaluation, or assessment of a Government							
	commercial or industrial activity, a proposed new start,							
	or a contract in excess of \$100,000 annual cost, in			ł				
	accordance with OMB Circular A-76 and DOE Order 4510.1.							
	(a) Pinal report.	SM	A+2yrs		4yrs	A+lyr		
·	AUTHORIZATION: PERC-18CFR-125.3/7(a)		,	DENDI	NU	1		
1	AUTHORIBATION. FERC TOCER-123-3/ / (4)		्र ^{त्र} :	TENU	Nb	•		
	(b) Background papers.	z	A+2yrs		4yrs			
1			,					
	AUTHORIZATION: FERC-18CFR-125.3/7(a)			DLAM	NC	ł		
			,	TLITUI	NU			
N-17	Audits	AK	A+2yrs	lyr	5yrs	A+2yrs		
	Official examinations, verifications, and reviews of		_			_		
	financial and program records and accounts.			1	1	.		
İ								
	AUTHORIZATION: GRS 25/1		•					
	22/2	1 1						
N-17-11	Audits by BPA	AK	A+2yrs	lyr	5yrs	A+2yrs		
	Material relating to impending audits or reviews and		er i	idai s. m.				
	results of planning surveys and audits which result in		1	a detribi	4	1		
	no reportable findings.	į			_	İ		
	AUTHORIZATION: CRS 25/4							
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A - ACTIVE
P - PERMANENT
S - SUPERSEDED/OBSOLETE

x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

Z - OHIGINATING OFFICE

BPA RECORDS MANUAL

CHAPTER

MANAGEMENT

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D 04-15-88 T DOE/NARA

APILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE
MN-17-12	Audits by DOB	AK.	A+2yre	lys	5yre	A+3yrs
	Material relating to Internal Audit's function as point of contact for handling DOE matters. Also contains material relating to DOE's position on Inspector General (IG) reports. AUTHORIZATION: GRS 25/4 JHV				iji <mark>k</mark> ogo.	
MN-17-13	Audits by General Accounting Office Material relating to Internal Audit's function as point of contact for handling Government Accounting Office (GAO)	AK	A+2yrs	lyr	5yrs	A+2yrs
	matters. Includes material about DOB's position on GAO reports. AUTHORIZATION: GRS 25/4 77/2			្តែ ដ ើលទីទី៖		
-17-15	Audits by Others Material relating to obtaining Inspector General (IG) authorization of audit services contracts from external audit groups.	AK	A+2yrs	lyr 	5yrs	A+2yrs
	AUTHORIZATION: GRS 25/4 22/2					
MN-17-16	DOE Audit Report Tracking System Material relating to the Department of Energy's Audit Report Tracking System (DARTS), including input reports required by DOE Order 2300.1A, "Audit Compliance and Followup."	AK	A+2yrs	lyr	Syrs	A+2yrs
	AUTHORIZATION: GRS 25/4			· · · · · · · · · · · · · · · · · · ·	12.1	

A - ACTIVE
P - PERMANENT
S - SUPERSCRED/ORSOLETE

See Section 800 8 for explanation of KLY terms.

x FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

Z - ORIGINATING OFFICE

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04-15-88 DOE/NARA

APILE GUIDE AND RETENTION SCHEDULE

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N-17-17	Pederal Manager's Pinancial Integrity Act	AK	A+2yrs	lys	2yre	A+2yra
	Material relating to the biannual vulnerability assessment process of all BPA programs and administrative functions, to Internal Control Reviews (ICRs), to the Administrator's annual assurance memorandum to the Secretary on BPA's internal control and accounting systems, and to Internal		-		-	
-	Audit's annual review of BPA's accounting system as required by the Federal Manager's Financial Integrity Act (PMFIA) and				1060	
	OMB Circular A-123			A ske	4 9 9 1	
	AUTHORIZATION: CRS 25/4 2212					
N-18	Productivity Material relating to BPA's attempt to link its products and	SM	3yrs	# 1	3yra	2yrs
	services directly to the consumption of resources used to create those products. Includes BPA's response to OMB					
•	Circular A-11.			PEND	NG	
_	AUTHORIZATION: DOE 16/8(b)(1)(b)					
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A - ACTIVE

P - PERMANENT

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See Section 8008 for explanation of KEY terms.

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FILE GUIDE AND RETENTION SCHEDULE

		OFFICE		RETENTI	ON PERIOD	·
FILE COD	E RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF	-	FICE OF RECO	; -	OTHER COPIES
O'EE GODE	The state of the s	RECORD	IN	STOP	,	IN
			OFFICE	BPA:	FRC	OFFICE
OP-	OPERATIONS		See Dis	position -		A+lyr -
	Material relating to the operation of the power transmission	1	,	,	1	1 '
	system. Data may be recorded on various media including paper,				1	
	rilm, tape, disk, or diskette, unless otherwise specified in			, ili		
	the narrative disposition.		•			
	Disposibles. In accordance with inchrystians for excelling	1			•	
i. Markinia	<u>Disposition:</u> In accordance with instructions for specific material described by the following related subjects.				:	1
	material described by the following related subjects.	•				,
	AUTHORIZATION: Recommendation of Management			11 P. P		ì
	All retentions in this series that are by "Recommendation					
	of Management" are justified as follows:					1
1	(a) for historical documentation of the BPA power system,					1
	(b) because of legal responsibilities relating to power]
	system accidents, or (c) to serve as reference to trace		,			
	trends in equipment problems.				3.86	
		1		I I shi	No.	
OP-11	Dispatch	MO	A+lyr			
	Official records of dispatcher actions taken, conversations		,			
	recorded, and procedures	1 [!	,
•	, , , , , , , , , , , , , , , , , , , ,		•	OFMOR	MO	
	AUTHORIZATION: Recommendation of Management			PENDI	N State	ł
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FILE GUIDE AND RETENTION SCHEDULE

FILE CODE

BPA

RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION

Logs

A chronological record of the operation of BPA's electrical system. Includes information on switching operations, clearances, weather data, Federal plant loading, line and substation equipment trouble. Prior to 1980, records are hardcopy; since 1980, records are microfilm (COM).

Disposition: Records constitute life study data for the BPA electrical system. Retain 3 years in office; store for 25 years thereafter or for 10 years after plant is retired, whichever is longer (FERC 125.2(n)(5)).

AUTHORIZATION: FERC-18CFR-125.3/23

Recordings

Tape recordings of Dispatcher's telephone conversations.

Disposition: Recordings of major system trouble, accidents, and other unusual conditions - indefinite; all others - reuse when 2 years old.

AUTHORIZATION: Recommendation of Management

		RETENTIO	N PERIOD	_
OFFICE	OFFICE	OF RECOR		OTHER COPIES
OF RECORD	iN	STORA	GE	10
	OFFICE	BPA	FRC	OFFICE
МО	See Dispos	ition	1 t t t t t t t t t t t t t t t t t t t	3yrs
MO	See Dispos	ENDI	VC VC	

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OPERATIONS

FILE GUIDE AND RETENTION SCHEDULE

OF The second state of the	R COPIES
RECORD SCHIES THEE, DESCHIE TON, AND SIGNAGE	OFFICE
OP-11-13 Daily Interrupcion Reports	rs
Reports of interruptions to customers' service,	
interruptions in lines, faulty operation of electrical	
equipment, system weather conditions, and other unusual conditions. Ten years of data is kept continuously on	
magnetic tape as a working file for analysis; data is	
recorded on microfilm (COM) as the official record.	•
Disposition: Records constitute life study data for the	
BPA electrical system. Retain COM 3 years in office; store	
for 25 years thereafter or for 10 years after plant is	
retired, whichever is longer (PERC 125.2(n)(5)).	
AUTHORIZATION: PERC-18CFR-125.3/23	
OP-11-14 Standing Orders MO S	
Dispatcher guides for special operating conditions.	
Orangial.	
AUTHORIZATION: Recommendation of Management	•
on 11 15 Loop Plow Curtailment Procedures	
OP-11-15 Loop Flow Curtailment Procedures Records documenting guidance to mitigate Western	
interconnecting line overloads due to unscheduled power	
transfers.	
AUTHORIZATION: Recommendation of Management	

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FILE GUIDE AND RETENTION SCHEDULE

1		OFFICE		RETENTIO	PERIOD	
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	iN	STORAG		OTHER COPIES IN OFFICE
OP-12	Outages Procedures and records for equipment outages required by coordination through BPA outage dispatcher as outlined in BPA Reliability Criteria and Northwest Power Pool (NWPP) Operating Manual.	МО	S		ir.	S
	AUTHORIZATION: Recommendation of Management			PENDIN		
OP-12-11	Planned Outages Computer generated reports	MO	S	OFMOIA	ic.	S
	AUTHORIZATION: Recommendation of Management			PENDIN	10	
OP-12-12	Requirements for Outages AUTHORIZATION: Recommendation of Management	МО	S.	PENDIN	6	s
OP-12-13	Applications for Outages	MO	3yrs			
	Requests to the Outage Dispatcher to remove energized equipment from service to perform necessary line work. See also OP-19, Tests.					
	AUTHORIZATION: BPA Records Schedule & Files Handbook PO-10			. 620138	-	
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			RETENTIO	N PERIOD
RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	OF IN OFFICE		
Operation of Interties and Interconnections	MO.	A+lyr	‡ :	
Material relating to operating interties and				
interconnections. File alphabetically by line name. See also			i	
			-	
Interconnections.			PLMIII	25.00
AUTHORIZATION: Recommendation of Management			LEMIN	עו
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			DENNI	NC
EX-15-16, Utility Organizations, and Ex-15-17, Industries.			TENU	M
AUTHODITATION. Decommendation of Management				
AUTHORIZATION; Recommendation of Hundychiene			12.1	ļ., .
Security Application Programs	МО	5yrs	A 4 4 10 10 10 10 10 10 10 10 10 10 10 10 10	黑事设备
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l				
• •			OCNN	IMI'
AUTHORIZATION: Recommendation of Management			TENU	UVD
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Voltage Control	MO	5yrs		5yrs
Material relating to both monitoring and control action				i
documentation and requirements.				
	,		DEVIU	INC
AUTHORIZATION: Recommendation of Management			TENU	IIID
	Operation of Interties and Interconnections Material relating to operating interties and interconnections. File alphabetically by line name. See also gD-14, Interties, and RP-15, Planning for Interties and Interconnections. AUTHORIZATION: Recommendation of Management Joint Operating and Coordination Agreements Agreements with other utilities and generating companies about clearance procedures, coordination of work, scheduling practices, and performing reciprocal work during emergencies. File alphabetically by name of utility or company. See also EX-15-16, Utility Organizations, and EX-15-17, Industries. AUTHORIZATION: Recommendation of Management Security Application Programs Material relating to on-line control computer programs that assess current state of the power system. AUTHORIZATION: Recommendation of Management Voltage Control Material relating to both monitoring and control action documentation and requirements.	Operation of Interties and Interconnections Material relating to operating interties and interconnections. File alphabetically by line name. See also ED-14, Interties, and RP-15, Planning for Interties and Interconnections. AUTHORIZATION: Recommendation of Management Joint Operating and Coordination Agreements Agreements with other utilities and generating companies about clearance procedures, coordination of work, scheduling practices, and performing reciprocal work during emergencies. File alphabetically by name of utility or company. See also EX-15-16, Utility Organizations, and EX-15-17, Industries. AUTHORIZATION: Recommendation of Management Security Application Programs Material relating to on-line control computer programs that assess current state of the power system. AUTHORIZATION: Recommendation of Management Voltage Control Material relating to both monitoring and control action documentation and requirements.	Operation of Interties and Interconnections Material relating to operating interties and interconnections. File alphabetically by line name. See also ED-14, Interties, and RP-15, Planning for Interties and Interconnections. AUTHORIZATION: Recommendation of Management Joint Operating and Coordination Agreements Agreements with other utilities and generating companies about clearance procedures, coordination of work, scheduling practices, and performing reciprocal work during emergencies. File alphabetically by name of utility or company. See also EX-15-16, Utility Organizations, and EX-15-17, Industries. AUTHORIZATION: Recommendation of Management Security Application Programs Material relating to on-line control computer programs that assess current state of the power system. MO 5yrs AUTHORIZATION: Recommendation of Management Voltage Control Material relating to both monitoring and control action documentation and requirements.	Operation of Interties and Interconnections Material relating to operating interties and interconnections. File alphabetically by line name. See also ED-14, Interties, and RP-15, Planning for Interties and Interconnections. AUTHORIZATION: Recommendation of Management Joint Operating and Coordination Agreements Agreements with other utilities and generating companies about clearance procedures, coordination of work, scheduling practices, and performing reciprocal work during emergencies. File alphabetically by name of utility or company. See also EX-15-16, Utility Organizations, and EX-15-17, Industries. AUTHORIZATION: Recommendation of Management Security Application Programs Material relating to on-line control computer programs that assess current state of the power system. AUTHORIZATION: Recommendation of Management Voltage Control Material relating to both monitoring and control action documentation and requirements. DENN OFFICE OF RECORD No OFFICE OF RECORD NO OFFICE O

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OP-6

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		OFFICE P		RETENTION	
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	OFFIC IN OFFICE	E OF RECORD STORAG	
OP-15-12	Power Flow Material relating to system requirements and design details.	МО	5yrs		5yrs
OP-15-13	AUTHORIZATION: Recommendation of Management Contingency Selection - Fast Outage Program	МО	5yrs	PENDI	G 5yrs
	Material relating to requirements to interface to bus forecast and outage schedule program. AUTHORIZATION: Recommendation of Management		P	ENDIN	C
OP-15-14	Stability - Transient Energy Function Material relating to research and development project for direct stability analysis. AUTHORIZATION: Recommendation of Management	МО	A+lyr	PENDI	NG NG
OP-16	Stability Control Schemes Also known as Remedial Action Scheme and Special Protection Schemes by Western Systems Coordinating Council (WSCC) and North American Electric Reliability Council (NERC). The schemes control dynamic energy inbalances when sudden changes in generation or transmission separations occur. See also ED-24, Remedial Action Schemes.	МО	s	CAMIA	r
	<u>AUTHORIZATION</u> : Recommendation of Management				Ų į

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OP-7

A FILE GUIDE AND RETENTION SCHEDULE

		055105	RETENTION PERIOD				
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	OF IN OFFICE	FICE OF RECORD STORAGE BPA FRC	OTHER COPIES IN OFFICE		
OP-16-11	Under-Frequency Load Shed/Load Dropping A NWPP-coordinated program. Includes Area correspondence to identify customer load to drop. AUTHORIZATION: Recommendation of Management	МО	S	PENDING			
OP-16-12	Import Contingency Load Trip Scheme Material relating to AC intertie import stability conditions and trips industrial load.	МО	S	PENDING			
OP-16-13	AUTHORIZATION: Recommendation of Management Industrial Load Drop Signaling System Material relating to manual load drop due to inadequate system reserves.	МО	s	OLVIDIVIO 1 TIMBIO			
OP-16-14	AUTHORIZATION: Recommendation of Management Pacific Intertie Stability Control Schemes	МО	s	PENUING DENDING	s		
OP-16-15	AUTHORIZATION: Recommendation of Management Open Loop Operation Variation of OP-16-14 for direct current (DC) intertie operation when 500-kV system is open in Los Angeles area.	МО	s	PENUIND			
	AUTHORIZATION: Recommendation of Management			PENDING			

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	OFFICE OF RECORD IN STORAGE OFFICE BPA FRC OFFICE
OP-16-16	Stability Control Intertie Monitor Variation of OP-16-14 for stability control intertie monitor (SCIM); new controller to replace Grizzly Substation control/ logic scheme. AUTHORIZATION: Recommendation of Management	MO	PENDING
OP-16-17	Generator DroppingLibby Substation Material relating to local controls for special stability problems. AUTHORIZATION: Recommendation of Management	МО	s PENDING
OP-16-18	Boundary & BC Hydro Schemes Material relating to controls to maximize Seattle City Light (SCL) Boundary generation on three Boundary-Bell 230-kV lines.	МО	s PENDING
OP-16-19	AUTHORIZATION: Recommendation of Management Chief Joseph Brake Material relating to several special conditions which require mitigation of more complex controls.	мо	s first j. og
	<u>AUTHORIZATION</u> : Recommendation of Management		PENDING

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	O IN OFFICE	FFICE OF RECORD STORAGE BPA FRC	OTHER COPIES IN OFFICE
OP-16-20	Lower Snake/Grand Coulee Line Loss Schemes	МО	S		
	Material relating to local controls to prevent			:	
٠.	instability for multiple contingencies.			PENDING	
	<u>AUTHORIZATION</u> : Recommendation of Management			Priminio	
OP-16-21	Colstrip Integration Control Scheme	MO	s		
	Material relating to transmission and generation				
·	constraints to maximize Colstrip transfers.			ACMBINO	
	AUTHORIZATION: Recommendation of Management			PENDING	
OP-16-22	Bellingham Area Load Trip Scheme	МО	s		ļ
	Material relating to the Bellingham area load trip scheme				
	(BALTS); local scheme to account for contingencies in Canada			OLMUINO	
	and PSPL line outages.			PENDING	
	<u>AUTHORIZATION</u> : Recommendation of Management				
OP-17	System Restoration	МО	s		
	A plan to restore service after local or regional blackouts.			0710110	
	AUTHORIZATION: Recommendation of Management			PENDING	
OP-17-11	Remote Synchronization Scheme	МО	s		
	Material relating to aid to quickly synchronize islanded				
	area via Supervisory Control and Data Acquisition (SCADA).			DEAIDIAIC	
	AUTHORIZATION: Recommendation of Management			LEMUNA	

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		OFFICE		RETENTION PERIOD	
	RECORDS STREET TITLE DESCRIPTION AND DISPOSITION	OF		CE OF RECORD	OTHER COPIES
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN OFFICE	STORAGE BPA FRC	OFFICE
.	and the same and t				
OP-17-12	Dead Bus Clearing Scheme	MO	S		
	Material relating to aid to quickly clear a transmission				
	path between generation and load via SCADA.		•	DEVIIINI.	
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	AUTHORIZATION: Recommendation of Management				· ·
		мо	20yrs	20 M 20 A 40 A 46 T 1	3yrs
OP-17-13	System Restoration Tests Material relating to practice procedures of skills	no.	20118		31.5
	needed for blackout restoration.			1	
	needed for blackout restoration.			NEAINIAIR	Ĩ
	AUTHORIZATION: Recommendation of Management			Trivilli i i	
	AOIRONIZATION: Recommendation of handy-men-	İ	1 1 4	viji ovi .	
OD 10	Substations	МО	A+lyr	# 162. # 16. 40 43 15 1	
OP-18	Material relating to operation of each substation.	хDO	•		
	Material relating to operation of each subscatton.			OFMONIO	
	AUTHORIZATION: Recommendation of Management	,		PFNIIINI.	,
	MOTHOR PARTICIPATION . RECOMMENDED TO THE PARTICIPATION .	1		FILMIN	
OP-18-11	Customer Service Substation	MO	7yrs	e e sa la la la la la la la la la la la la la	
01 10 11	General correspondence for all stations of this class.		g. 13 g		
				ULTIDIAIC	
	AUTHORIZATION: Recommendation of Management			PENDING	
			_	4 200000	·
OP-18-12	Small Generation Resources	MO	A+lyr	•	
	Material relating to integration into BPA substations.	\			
	AUTHORIZATION: Recommendation of Management			DEMINIATO	
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF	iN	FFICE OF RECORD STORAGE	OTHER COPIES
T		RECORD	OFFICE	BPA FRC	OFFICE
OP-18-13	Substation Alarm Logger Material relating to substation alarm logger (SAL), which is used only where SCADA would not be cost effective.	МО	s	AFNONO	
*4	AUTHORIZATION: Recommendation of Management			PENUIN6	
OP-18-14	Substation Integrated Control Systems Material relating to substation integrated control systems (SICS) used in large stations.	MO	S	OCAIDIMO	
	<u>AUTHORIZATION</u> : Recommendation of Management	3			
OP-18-15	Gas Insulated Substation General guidance on special operating and alarm requirements of gas-insulated substations (GIS).	MO	S	DEMDING	S
	AUTHORIZATION: Recommendation of Management			LENNINO .	
OP-18-16	Annunciators General guidance on alarm requirements.	МО	5yrs	OCAIONIC	
,	AUTHORIZATION: Recommendation of Management			PENUING	
OP-19	Tests Material relating to tests of BPA equipment. All system tests of energized equipment must be approved by directors of System Engineering and System Operations. Scheduling	MO	A+lyr		
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	OFFICE V	RETENTION PERIOD				
FILE CODE RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	OF IN OFFICE	FFICE OF RECORD STORAGE BPA FRC	OTHER COPIES IN OFFICE		
the test is through the outage dispatcher. File alphabetically by type of test. See also OP-12-13, Applications for Outages, and ED-12-15, System Tests. AUTHORIZATION: Recommendation of Management			PENDING			
Pault Tests Records documenting planned tests to verify new equipment performance. See also ED-12-14, Laboratory Reports, and ED-18-11, Test Data. AUTHORIZATION: Recommendation of Management	МО	A+lyr	PENDING			
-19-12 Switching Tests Material relating to visible arcs and improperly applied switches. See also OP-19-11, Fault Tests. AUTHORIZATION: Recommendation of Management	МО	A+lyr	PENDING			
Transformer Tests Material relating to phasing checks, soaking, and test energization procedures. AUTHORIZATION: Recommendation of Management	МО	A+lyr	PENDING			

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	OFFICE OF RECORD IN STORAGE OFFICE BPA FRC OFFICE			
OP-19-14	<pre>Past Power Change Tests Material relating to stability controls on High Voltage Direct Current (HVDC) terminal. AUTHORIZATION: Recommendation of Management</pre>	МО	PENDING			
OP-19-15	Startup Tests Material relating to tests on new equipment. See also OP-19-11, Fault Tests. AUTHORIZATION: Recommendation of Management	MO	PENDING .			
OP-19-16	1100-kV Tests <u>AUTHORIZATION</u> : Recommendation of Management	МО	PENNINC PENNINC			
OP-19-17	500-kV & HV Line Tests Material relating to insulation level checks. See also OP-19-11, Fault Tests. AUTHORIZATION: Recommendation of Management	МО	PENDING			
OP-19-18	Series Capacitor Tests Material relating to equipment performance, and switching capability. AUTHORIZATION: Recommendation of Management	MO	PENDING			
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OP-14

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION
OP-20	Voltage & Loads Equipment needs, usage studies and reports, and monitoring requirements.
	AUTHORIZATION: Recommendation of Management
OP-20-11	Capacitors Material relating to rating needs for various voltage applications.
	AUTHORIZATION: Recommendation of Management
OP-20-12	Reactors Material relating to studies and requirements at system and local level.
	AUTHORIZATION: Recommendation of Management
OP-20-13	Power Factor Waiver applications.
	AUTHORIZATION: Recommendation of Management

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OP-15

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN OFFICE
OP-20-14	Schedules Annual studies and requirements for station and generation profiles coordinated with Northwest Power Pool (NWPP) criteria.	МО	S
	AUTHORIZATION: Recommendation of Management		
OP-20-15	Transformers Material relating to requirements for system transformers, spares, and tap changers.	МО	S
	AUTHORIZATION: Recommendation of Management		
OP-20-16	Load Curtailment Procedures and studies to mitigate overloads.	МО	S
	AUTHORIZATION: Recommendation of Management	!	
OP-20-17	Load Tripping Material relating to automatic load shedding for overloads and reserve contingencies.	MO	S
	AUTHORIZATION: Recommendation of Management		
OP-20-18	DSI Contract Demands Material relating to the investigation of load shifts.	MO	S
,	AUTHORIZATION: Recommendation of Management		
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF	IN	STOR	AGE	iN
		RECORD	OFFICE	8PA	FAC	OFFICE
	A CONTRACT OF THE CONTRACT OF	40			2	•
OP-20-19	Voltage Charts	MO	lyr	İ	2yrs	
,	System substation voltage readings.				4	
,				ULAINI	MC	
	AUTHORIZATION: FERC-18CFR-125.3/23			TTIVIII	NID	İ
						•
OP-21	Control Centers	МО	5yrs			
05-21	Material relating to power system control centers in general.				1	1
	Use tertiary subjects below for specific sites.			i		
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	AUTHORITANION D			PHNIII	NI.	l .
	AUTHORIZATION: Recommendation of Management			FILL	, v	
			E	1 349434	T i	l
OP-21-11	Dittmer Control Center	MO	5yrs	1	A	I
	Material relating to the Dittmer Control Center, including					l
	guide book development.			APMIN	ALC:	
				NFMIII	MI.	
	AUTHORIZATION: Recommendation of Management			I FIIDI	IIU	
					i ka	1
OP-21-12	Eastern Control Center	MO	5yrs	• . ,	A	
OF-21-12	Material relating to the Eastern Control Center.					
	naterial relating to the Baston some	ŀ	,	ULYIDI	NO	ľ
	AUTHORIZATION: Recommendation of Management			Privili	WI2	
	AUTHORIZATION: Recommendation of management			T LITTLE	TO TO	1
	a characteristic	МО	s			s
OP-21-13	Software Security	I NO	5	,	1 +	
	Material relating to and regulations on software security.	1 .		镇 形式。	i, i	
	See also SS-18-13, Computer Security, and IR-14, Automated					
	Systems Security.			OFMOR	in	•
				HIN144	NI.	1
	AUTHORIZATION: Recommendation of Management			i riini	MV	
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FILE GUIDE AND RETENTION SCHEDULE

[]		055105	RETENTION PERIOD			
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	ĮN.	CE OF RECORD STORAGE BPA FRC	OTHER COPIES IN OFFICE	
OP-21-14	Emergency Standby Power/Uninterruptable Power Supply Material relating to building requirements during outages of station service. AUTHORIZATION: Recommendation of Management	МО	s	ENDING		
OP-21-15	Fire Protection Material relating to halon systems, alarm procedures, and evacuation procedures specifically for power system control centers. AUTHORIZATION: Recommendation of Management	МО	s P	ENDING		
OP-21-16	Human Factors Design Material relating to guidance and requirements for dispatcher's displays, consoles, and group boards. See also OP-26-22, Display System. AUTHORIZATION: Recommendation of Management	МО	10yrs	PENDING	4yrs	
OP-21-17	Contingency Plans Material relating to vital records and contingency plans for control centers' emergency preparedness. See also OP-21-15, Fire Protection. AUTHORIZATION: Recommendation of Management	МО	s P	ENDING		
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	OFF IN OFFICE	ICE OF RECOR STORA BPA	71 40	OTHER COPIES IN OFFICE
OP-21-18	Interutility Data Exchange Material relating to other utilities about installation and requirements for control center interface and user applications. AUTHORIZATION: Recommendation of Management	MO	S	PENDIN	G	S
OP-22	Automatic Generation Control Material relating to the use of and requirements for automatic generation control (AGC, also known as Load Frequency Control or LFC). Disposition: In accordance with instructions for specific material described by the following related subjects.	MO	See Dis	position	V	A .
OF 2-11	AGC Interim Spinning Reserve Material relating to manual data system from powerhouse to Realtime Operation Dispatch System (RODS). AUTHORIZATION: Recommendation of Management	MO	A+2yrs	PEND	ING	
OP-22-12	AGC Powerhouse Data Acquisition System Material relating to AGC powerhouse data acquisition system (PHDAS), the automatic spinning reserve system between the Army Corps of Engineers and BPA. Ties into the rotary accounts like CBT. AUTHORIZATION: Recommendation of Management	МО	A+2yrs	PENI	ING	,

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		i	OFFICE	BPA	FRC	OFFICE
OP-22-13	AGC Backup	MO	7yrs			
·	Material relating to alternate automatic generation			1		1
1	control backup (BUAGC) at control centers.		1	OFAIDIS	10	}
				PENDIN		
·,	AUTHORIZATION: Recommendation of Management		į	Lituin	U .	
				•		
OP-22-14	Celilo Digital	MO	A+lyr			
	Material relating to the control link to send power orders			1.		
	to and receive alarms from High Voltage Direct Current (HVDC)	4	4		n	
				PENUIN	5	İ
	<u>AUTHORIZATION:</u> Recommendation of Management			FIIDHİ	V	
'	•			;		
OP-22-15	AGC Cost of ServiceLoad Following	MO	A+lyr	:		
	Material relating to the determination of charges to serve				_	
	borderline loads (transfer customers).	`	•	armial)	Ŋ	1
			1	71111111	3	1
	AUTHORIZATION: Recommendation of Management		·	PINNIN		
	20 1 1 2 20 1 2 2 2 2 2 2 2 2 2 2 2 2 2	MO	10	'		
OP-22-16	Numbers/Energy Accounting	MO	10yrs			
	Material relating to after the fact accounting of automatic	i		_ _ l		1
, •	generation control (AGC) interchange flows vs. schedules.			DEMINIA	r	
	AUTHORIZATION: Recommendation of Management		•	LLIAIIIIA	h	
· .	AUTHORIZATION: Recommendation of Hanagement			, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	~	ł
OP-22-17	Meter Check	МО	10yrs			
	Material relating to the weekly check of meters.		•	ļ		
}				AFILE	10	J
	AUTHORIZATION: Recommendation of Management			hrvilliy	II.'	
	-			I CHUII	11)	
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FILE GUIDE AND RETENTION SCHEDULE

		OFFICE I	RETENTION PERIOD			
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		OFFICE OF RECORD			
		OF RECORD	IN STORAG		E	ı
	·	MECOND	OFFICE	BPA	FRC	ı
02 03 10	and a time took Charte	МО	2mos		34mos	I
OP-22-18	AGC & Line Load Charts Records of power interchange with other utilities, Federal					ı
	Records of power interchange with other definition and					ı
	generation, and control information used to monitor and			drupi	10	ı
	analyze the operation of the power system.			PENDI	8.8	١
	AUTHORIZATION: FERC-18CFR-125.3/22.1(f)			LINDI	W.	
OP-23	Frequency & Time Synchronization	МО	10yrs			l
	Material relating to central and remote time transmission					ı
	to substations, local, and alternate frequency sources.			OFAIDIA	n.	۱
	AUTHORIZATION: Recommendation of Management			PENDIN	n air	I
OP-23-11	System Time Synchronization	МО	A+lyr			l
•	Guidelines and agreements for central and satellite time	i 1		1		I
	systems.	ĺ	•	OFMON	n	ı
	o joccino -	i I	• /	hFNIIIN	14 15 c	1
	AUTHORIZATION: Recommendation of Management		•	1 THOM	O4 # !	١
				,		ı
OP-24	Meter, Relay, and Metering	МО	S	•		ı
	Requirements and use of these systems for engineering,			.		ı
	operations, and maintenance programs.					١
	AUTHORIZATION: Recommendation of Management			05404		I
				PENDIN	3	l
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A FILE GUIDE AND RETENTION SCHEDULE

FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION
OP-24-11	Revenue Metering Systems Material relating to the implementation, addition, or change of remotes, central computer, and links to mainframe computer, RODS, and the field.
	AUTHORIZATION: Recommendation of Management
OP-24-12	Interchange and KWH Meters Agreements with other utilities to install or delete meters. See also OP-22-16, Numbers/Energy Accounting.
·	AUTHORIZATION: Recommendation of Management
OP-24-13	Oscillographs Requirements for central monitoring and disturbance analysis.
	AUTHORIZATION: Recommendation of Management
OP-25	Monitoring Systems Material relating to SCIM, DTLLM, IPS, PSDM, SEMM/SUDS/SER, Microwave Monitoring, and FLAR. Monitoring systems to aid dispatchers in operating power system close to maximum capability with adequate security. Usually small systems linked to RODS to facilitate central monitoring.

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	OFI IN OFFICE	FICE OF RECORD STORAGE BPA FRC	OTHER COPIES IN OFFICE
OP-25-11	Control Systems Monitor Material relating to general program requirements and administrative requirements in the control systems monitor (CSM) room. Monitors alarms in areas such as microwave and substations. AUTHORIZATION: Recommendation of Management	мо	5yrs	PENDING:	
OP-25-12	Dynamic Thermal Line Load Material relating to the program to compute actual wire temperature on overloaded transmission. AUTHORIZATION: Recommendation of Management	MO	5yrs	PENDING	
OP-25-13	Intertie Protection Scheme Material relating to intertie protection scheme (IPS), remedial action schemes arming and disarming. AUTHORIZATION: Recommendation of Management	MO	5yrs	PENDING	
OP-25-14	Local/General Generator Dropping Subset of OP-25-13 to monitor local generator dropping conditions. See also OP-16-20, Lower Snake/Grand Coulee Line Loss Scheme. AUTHORIZATION: Recommendation of Management	МО	5yrs	PENDING	

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	OFFICE OF RECORD IN STORAGE IN OFFICE BPA FRC OFFICE
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OP-25-15	Load Tripping Schemes Subset of OP-25-13 to monitor import levels. See also OP-16-12, Import Contingency Load Trip Scheme.	MO	PENDING
٠,	<u>AUTHORIZATION</u> : Recommendation of Management		
OP-25-16	Power System Disturbance Monitor Records saving interchange and generation data at high speed for post-disturbance analysis, including design and trigger requirements.	МО	PENDING
· ·	AUTHORIZATION: Recommendation of Management		1 CHOIND
OP-25-17	Sequence of Events Monitor/Recorder Records that show centrally the events of local and regional disturbances. Includes requirements and alarm standards. Also known as SEMM/SUDS/SER.	МО	s PENDING
	<u>AUTHORIZATION</u> : Recommendation of Management		
OP-25-18	Voltage Monitoring Program Records that show SCADA voltage control actions, including program specifications.	MO	5yrs
	<u>AUTHORIZATION</u> : Recommendation of Management		PENDING

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OP-24

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF	IN	STORAGE	IN
		RECORD	OFFICE	BPA FRC	OFFICE
OP-19	Powerhouse Response Test	MO	s		1
Or Es 15	Guides for minimum performance and procedures for			i	
				ACMINIA	
	conducting tests.			PENDING	
				LTMAINA	
	AUTHORIZATION: Recommendation of Management				
		i			· ·
OP-25-20	Tr ends	MO	. s ,		
01 10 10	Material relating to alarm and requirements features.		1		
	indection beautiful to another than the second			ACHOMIA	· ·
,	AUTHORIZATION: Recommendation of Management	•		PENDING	
	AUTHORIZATION: Recommendation of Hanagement			I THAILA	
	•	МО	5yrs		
OP-25-21	Hydromet/GOES	, 1	JA L B		
	Material relating to operation and maintenance of	PS			
	Geostationary Orbital Environmental System (GOES)				
	satellite receiver. Also includes data gathered by the		·		1
_	GOES which is managed by the Division of Power Supply (PS).			OFAIDIAIC	
	GODD WILLIAM TO MANAGE DI THE DEVELOR			PENDING	
	AUTHORIZATION: Recommendation of Management			1 Plantings	
	AUTHORIZATION: Recommendation of Management	1.			
	- a. a. a. a. a. a. a. a. a. a. a. a. a.	МО	7yrs	:	
OP-25-22	Fault Locator Acquisition Recorder	110	7,120	<u> </u>	
	Material relating to user requirements and display	1			
	features of the fault locator acquisition records (FLAR).			1	
	See also OP-25-17, Sequence of Events Monitor/Recorder.			1	
				ACMIDIMO	•
	AUTHORIZATION: Recommendation of Management			PENDING	
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	OFFIC IN	OTHER COPIE	
		I COM	OFFICE	BPA FRC	OFFICE
OP 26	Real-Time Operation Dispatch & Scheduling	HO	A+lyr		
	Material relating to planning and maintaining real-time operation dispatch and scheduling (RODS) system, including performance, software, hardware, database, and consoles. Also includes material on the main computer system at		WIT	HBRAWN	
**************************************	Dittmer Control Center, material on interchange scheduling, load forecasting, generation allocation, generation control, monitoring (OP-25), system security, and reliability power flow studies.			PENDING	
OP-26-11	AUTHORIZATION: Recommendation of Management RODS Coordination Committee	мо	A+lyr _{Wii}	HERAWN	
	Material relating to meeting agendas and minutes. <u>AUTHORIZATION</u> : Recommendation of Management		•	PENDING	
OP-26-12	RODS Console Replacement Material relating to requirements and vendor correspondence.	MO	A+2yrs	THORAWN	
OP-26-13	AUTHORIZATION: Recommendation of Management RODS Integration Committee	мо	A+2yrs	KEIANIIA()	
	Material relating to the migration plan and requirements for the new system.			OF ADDIAG	
	AUTHORIZATION: Recommendation of Management			LEMINA	

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF	, O	FFICE OF RECO		OTHER COPIES
		RECORD	OFFICE	BPA	FRC	OFFICE
OP-26-14	Microwave Communication System	MO	A+lvr			
	Material relating to the program to monitor BPA's microwave		_	WITH PRAWN	6.5	
	system. Includes Badger, Microwave Monitor, and Leased			DEALD		
	Line Lists.			PFNI	INI	
	AUTHORIZATION: Recommendation of Management		,		1110	
				WITHDIKAWN		ŀ
OP-26-15	Performance	МО	A	;		
	Semiannual report on availability and reliability.			OFMOI	NO.	i
	AUTHORIZATION: Recommendation of Management			PENIII	N)	Ì
					1 4 V 6	
OP-26-16	Software	MO	S	WITHDRAWN		S
	Material relating to and including guides on documentation and change control.		•	1		
	and change control.			DEMIN	MC	
	AUTHORIZATION: Recommendation of Management	1.		PEND	1113	
OP-26-17	Rotary Account Database Material relating to the Rotary Account Database and	MO	S	KEHIDRAWN	!	s
	account assignment methods.		:		_	İ
	**************************************			•		
	AUTHORIZATION: Recommendation of Management			- DEMNI	HP	
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RETENTION PERIOD OFFICE OTHER COPIES OFFICE OF RECORD OF RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION **FILE CODE** STORAGE RECORD FRC OFFICE OFFICE A+2vrs 0P-26-18 Material relating to migration plans, upgrade needs, and WITHDRAWIL problem reports. AUTHORIZATION: Recommendation of Management A+2yrs MO OP-26-19 Upgrade Project Material relating to specifications, vendor correspondence, WITHDRAWN requirements, and migration plans. AUTHORIZATION: Recommendation of Management MO A+2yrs Low-Cost Console Display System OP-26-20 Material relating to consoles for management in Office of WITHDRAWN Power Sales (P) and in Divisions of System Operations (MO) and of Power Supply (PS). AUTHORIZATION: Recommendation of Management OP-26-21 MO A+2yrs Front End Reconfiguration Material relating to plans to change computers, software, WITHDRAWN and interfaces to new RODS. AUTHORISATION: Recommendation of Management

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OP-27

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L	A STATE OF THE STA		OFFICE	BPA	FHL	OFFICE
OP6-22	Display System	MO	lOyrs			4yrs
	Material relating to plans to combine consoles for RODS			WILHORAWN		
	and SCADA CRTs. New equipment and display guides. See			0210		1
	also OP-21-16, Human Factors Design.			NFWIII	MI.	•
	ATTHUODINATION Described of Management			1 TIANI	IVU	
	AUTHORIZATION: Recommendation of Management			-		
OP-27	Supervisory Control & Data Acquisition	МО	3yrs	1 5 1	1.44	
OP-27	Material relating to supervisory control and data acquisition		3715	WILLIURAWN!	· 本京引度知说:	
	(SCADA) system status reports, equipment, software, and remote			1		
	terminal units. Maintenance log books are kept with equipment		4	ACMO	40	
	and are retained for the life of the equipment.			NFNIII	INI:	
,	and are received for one tree of one of the			i riini	III	
	AUTHORIZATION: Recommendation of Management			1		
				♣ 🗟 :	e la se la la la la la la la la la la la la la	
OP_7-11	SCADA I	MO	3yrs	.autiDRAWN	,	1
	System status reports, equipment, and software problems.	+		THE PARTY OF THE P		
			_	ULVIUI	MC	
,	AUTHORIZATION: Recommendation of Management			LLMIII	MP	
			_	*		
OP-27-12	SCADA II	MO	3yrs		_ .	
	System status reports, equipment, and software problems.		1	WITHDRAWN		
	ATTENDA TO THE TOTAL TO THE TOTAL TO			1		!
	AUTHORIZATION: Recommendation of Management	++		ULTINII	TA T	
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OP 27-13	SCADA III	MO {	3yrs	
	System status reports, equipment, and software problems.		MINDRAWN	
		(OFMINIAL	
3	AUTHORIZATION: Recommendation of Management		PENIMINI.	
			TEHOING	
OP-27-14	TCDS	MO	A+2yrs	
.T.,	Material relating to TCDS (future replacement for SCADA).	1	WITHDRAWN	•
·	Maccinal de loss (langue refinement net monsult	į	ULVIDIVIC	
	AUTHORIZATION: Recommendation of Management		Privilinal	
	AUTHORIZATION. Resommendation of management		1 Pistrioner	
OP-27-15	SCADA Remote Terminal Units	мо	10yrs	
UP-27-15		HO I	•	
·	Material relating to requirements for connecting remote		WITHDRAWN	
	terminal units (RTUs) such as alarms and controls to control	1 1		
	centers.		A	
			PENDING	
	AUTHORIZATION: Recommendation of Management		i Krimmin I	
		!	1 1 10 10 10 10 10	
OP-27-16	Substation Data System Work Group	MO	S	
<u> </u>	Material relating to needs for future RTUs, including SER.	\	WITHDRAWN	
j			DEMONIO	
	AUTHORIZATION: Recommendation of Management		- PHOIIINE I	
	110211011221122011	!		
OP-27-17	Sequential Automatic Switching	МО	10yrs	
2, 1,	Material relating to plans to perform several switching	""		
	steps with one command.	1	WII THE TANK	
	sceps with one command.			
	AUMHORITANION. December debien of Monogoment		OFMOIMO	_
	AUTHORISATION: Recommendation of Management	 	PHVIIIVI.	
			8 F14(1)(41)	

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OP-30

A FILE GUIDE AND RETENTION SCHEDULE

1.				RETENTION PERIOD	
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	IN OFFICE		OTHER COPIES IN OFFICE
OP-27-18	SCADA Backup for Emergencies	MO	20yrs	1 1 111 111 11 11 11 11 11 11 11 11 11	
	Material relating to communication, RTU, and central site requirements. AUTHORIZATION: Recommendation of Management			PENDING	
OP-27-19	Southern Idaho Control Material relating to plans to place this area under Eastern Control Center (ECC) dispatch jurisdiction. AUTHORIZATION: Recommendation of Management	МО	5yrs	PENDING.	
OP-28	Microwave Transfer Trip/Telephones Material relating to microwave transfer trip/telephone (MWTT) requirements for monitoring, installation for stability reasons, and calling out repairs.	МО	7yrs	DENDIAIC	
OP-29	AUTHORIZATION: Recommendation of Management System Protection Relaying Material relating to requirements to change existing. practices. Studies on need to reclose, three terminal trip needs, bus, and bank protection schemes. AUTHORIZATION: Recommendation of Management	MO	7yrs	PENDING	
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	OFFICI IN OFFICE	RETENTI E OF RECOI STOR		OTHER COPIE IN OFFICE
OP 30	Operations Information Program Material relating to after the fact events such as equipment load levels, customer and transmission outages, dispatcher actions taken, interchange transactions, and meter readings. Case file by individual project.	MO	WITHD	RAWN	4	
	(a) Paper records (b) Magnetic tape AUTHORIZATION: Recommendation of Management		10yrs			
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A FILE GUIDE AND RETENTION SCHEDULE

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<u> </u>			OFFICE	BPA	FRC	OFFICE	
PΕ	PERSONNEL						
	(a) Material relating to objectives, policy, procedures,	- 2	Эуга	·		- s	
	and operations of personnel activities excluding records				1		
	specifically described elsewhere in this schedule and records				164		
	maintained at agency staff planning levels. Data may be						
	recorded on various media including paper, film, tape, disk,						
	or diskette, unless otherwise specified in the narrative					1	
	disposition.						
		,				1	
	AUTHORIZATION: GRS 1/3				 		
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	(b) Operating personnel office records relating to	SP	6mos			S	
	individual employees not maintained in Official Personnel	ХÀ		1	l		
	Folders (OPFs) and not provided for elsewhere in this						
	Schedule. Data may be recorded on various media including			ľ	ľ		
	paper, film, tape, disk, or diskette, unless otherwise		,	ATMIN	10		
	specified in the narrative disposition.			PENDI	NI:		
		1 1		PITO	שוין		
	AUTHORIZATION: Recommendation of Management					i	
	Official Personnel Folders	spo_	- See Disp	osition			
		ХA	_	}		ł	
	Disposition: In accordance with instructions for specific			- 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1	- 12 Mg		
	material described by the following related subjects.	•			, T		
					[1	
E-11-11	Permanent Individual Employee Records						
	Records filed on the right side of the Official Personnel					+	
	Folder (OPF).	- 		 -			
		I L			L		

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		OFFICE OF RECORD	RETENTION PERIOD					
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		IN	STORAGE		IN		
			OFFICE	BPA	FRC	OFFICE		
PB-11-11	- (a) Current employees 	SPO	A			 s		
		хA	<u>-</u>					
						1		
	(b) Transferred employees	SPO	See Dispos	ition		S		
		ХA						
	Disposition: See Federal Personnel Manual for							
	instructions relating to folders of transferred employees.					•		
		970						
	(c) Separated employees	SPO	See Dispos	1tion		S		
	No. 10 land 10	ХÀ				j .		
	Disposition: Transfer folder to National Personnel							
	Records Center, St. Louis, MO, 30 days after separation.			•		·		
	NPRC will destroy 75 years after birth date (60 years after	,				1		
	the date of the earliest document in the folder if no				4 - 1			
	birth date is given) or 5 yrs after separation, whichever							
	is later.					•		
	AUTHORIZATION: GRS 1/1					j		
	HOTHORIZATION. GRD 1/1		_					
-11-12	Temporary Individual Employee Records	SPO	lyr	•		· ·		
11 11	All correspondence and forms maintained on the left side	XA	or A					
	of the Official Personnel Polder except Performance							
	Appraisal materials. See also PE-25-14, Non-SES Employee							
	Performance File System Records.					<u> </u>		
		i		\$ 1	. 4			
	AUTHORIZATION: CRS 1/10			ke ``	!i' .			
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See Section 800.8 for explanation of KEY terms

BPA RECORDS MANUAL

CHAPTER

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T PERSONNEL

04-15-88

DOE/NAF

A FILE GUIDE AND RETENTION SCHEDULE

FILE CODE						
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	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORAGE		. IN
			OFFICE	BPA	FAC	OFFICE
PE-13	Personnel Management Agencies	SPD	<u>s</u>			<u> </u>
	Material relating to general program concepts, planning,	,	·			
	and policies, including prototypes.	1.				
	C+h					
**	AUTHORIZATION: GRS 16/1(2)8(d)		,			,
* *		ì			•	
PE-13-11	DOE Personnel Organization and Functions	SPP	S			S
* ×	Material relating to Department of Energy personnel					1
	management concepts, planning, and policies, including	ŀ	¥,			
	prototypes.		51	111 12 111 11		
	adb					1
	AUTHORIZATION: GRS 16/1(c)s(d)				,	
						İ
PE-13-12	BPA Personnel Organization and Functions	SPP	S			s
	Material relating to BPA headquarters and area personnel	,				
	management concepts, planning, and policy, including			1		
	prototypes.		+ \$- 8.	\$ 4 		1
1	arb	_	1 я	THE STATE OF		
	AUTHORIZATION: GRS 16/1(c)s(d)			[
PE-14	Reporting Requirements	SPP	2yrs			2yrs
	Reports, audits, justifications, and related material		Ī			
!	prepared for other Federal agencies such as the Office of					
	Management and Budget (OMB), and for DOE or BPA. Case file		Í			
	alphabetically by name of report or by requesting agency.					1
	NUMBER TRANSPORTED AND STATE OF STATE O		}	1		
	AUTHORIZATION: GRS 1/16					1
			+	j		
		. [Ĭ	ĺ		[

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FILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS BERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN	STORA	GE	. IN		
			OFFICE	BPA	FRC	OFFICE		
PE-15	Personnel Records Systems		λ		,			
	Systems tracking such personnel data as employee position					1		
	numbers, position titles, and personal histories. Includes							
	Employee Record Cards used outside personnel offices.	. i . i		_				
	Office of Record is often SPP.			DEMNI	No			
,	AUTHORIZATION: Recommendation of Management (ALS)			-F-H-UI				
****	AUTHORIZATION: Recommendation of Management (AF)				44			
			_			I _		
PE-16	Processing Personnel Actions	SP	S			S		
	Material relating to Standard Form 52, Request for Personnel	SPO						
	Action, and associated forms and processes. Includes	ХÀ						
	material not maintained in OPF and pertaining to pending					•		
	personnel actions.			DEMINIA				
	AUTHORIZATION: Recommendation of Management			PFMIIIN	Y.			
	normalitation, resonantinacion or management				· ·			
E-16-11	Notifications of Personnel Actions	SPO	lyr		1	s		
	(a) Standard Form 50 documents initial employment,	Αx						
_	promotions, transfers, separation, and all other							
	individual personnel actions, exclusive of those in							
	Official Personnel Folders.							
¥								
	(b) Chronological file copies of material listed in (a),	SPOD	2yrs		•	lyr		
	including fact sheets maintained in personnel offices.	1				1		
	AUTHORIZATION: GRS 1/14							
<u>-</u>	AUJURI CALLINE VIII I I I							
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See Section 800.8 for explanation of KEY terms.

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8PA 1845 NOV 1987

CHAPTER

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PERSONNEL

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1122 0002	independent in the property of the second in	RECORD	IN	STORAGE		IN OFFICE	
<u></u>			OFFICE	BPA	FRC	OFFICE	
E-17	Employment	SPP	5yrs	İ		s	
	Material relating to procedures, eligibility, implementation,		or S	· ·		1	
	and authority of employment activities and programs.					1	
* * *	(Includes Career/Career-Conditional and Temporary and Term					•	
	Employment, Excepted and Senior Executive Service, Details,						
	Status Reinstatement, Other-Than-Pull-Time Permanent		•				
	Employment, Veterans Preference, Volunteers, Veteran's			1			
·** **	Readjustment Appointments (VRA), Youth and Student				<u> </u>		
•	Employment, and others.) Case file by name of program/		1	ocuan	Mb .	1	
	activity or by PPM chapter number.			remul	TU		
	AUTHORIZATION: DOE 1/3(b)					1	
E-18	Promotion and Internal Placement	SPP	5yrs		İ	s	
	Material relating to the development and implementation of		or S				
	policy and procedures for promotion and placement within		•		·		
	Pederal Government service.			ACMA	MA	J	
				PENII	NI.		
	<u>AUTHORIZATION</u> : Recommendation of Management			Pilni	110		
<u>E-18-11</u>	BPA Merit Promotion Plan	SPO	A+2yrs	<u> </u>		A	
	Case files relating to the promotion of an individual that	ΧÀ					
	document the individual's qualification standards, the						
	evaluation methods, selection procedures, and evaluations	,				ł	
	of candidates, excluding any records that duplicate	'					
	information in the promotion plan, the Official Personnel	+					
	Folders, or in other personnel records.	1		+		ļ	
	1/32						
	AUTHORIZATION: CRS 1/39	 		 		 	

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A FILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		IN	STORAGE		IN		
			OFFICE	BPA	FRC	OFFICE		
E-18-13	Written Tests for Promotion/Internal Placement	SPO_	A+2yrs					
	Tests (evaluation methods) prepared for use in evaluation			ŀ		1		
	of candidates.							
	AUTHORIZATION: GRS 1/32							
E-18-14	Status Applicant File	SPO	lyr			S		
	Material relating to applications for reinstatement or							
	transfer to positions at BPA. Does not apply to	1 1		1				
	applications from current BPA employees.			PENDI	AC.			
·	AUTHORIZATION: Recommendation of Management			LFIADII	TU			
E-18-15	Reassignments and Transfers	SPP	s			s		
•	Material pertaining to the movement of current employees					1		
,	from one position to another or from one Pederal agency to			_	L_	ı		
	another.			PENDI	ir	ŀ		
			•	rriiiii	Ti y			
	AUTHORIZATION: Recommendation of Management					,		
B-18-16	Temporary Promotions	SPP	S			s		
	Material relating to promotions which are temporary or				,			
	limited in duration.							
				drainii	10			
;	AUTHORIZATION: Recommendation of Management			PENDII				
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FILE CODE	MECONDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		iN	STORAGE		IN		
			OFFICE	BPA	FRC	OFFICE		
PE-18-18	Assessment Centers	SPR	S			S		
D 10 10	Material relating to assessment and screening processes							
	for special program selections.		•			1		
	• •			PENDIN				
.' `	AUTHORIZATION: Recommendation of Management		1	LIIUII	JU			
,;,			•					
PE-19	Probation	SPP	· S	ļ		S		
	Material including instructions, policy, and directives	,		1		İ		
	concerning employee probation.							
•				PENDI	UI.			
•	AUTHORIZATION: Recommendation of Management	ļ		LITUI	JU			
	· · · · · · · · · · · · · · · · · · ·							
PE-19-11	New Employee Probation	SPO	λ			A		
	Material covering new career-conditional employee			İ				
	information, including lists. Case file by employee name.							
				PENDIN	ii:			
	AUTHORIZATION: Recommendation of Management		5	TIMMIN	ID .			
			_	T.				
PE-19-12	Probation for New Supervisors and Managers	SPO	A			Α		
	Material including lists, staff functions, class offerings,					•		
	and mandated tasks.					*		
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	AUTHORIZATION: Recommendation of Management		ſ	DEVIDIY	lb	•		
			ľ	ENDIA	l l			
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN OFFICE	STOR/	FRC	IN OFFICE
PE-20	Recruitment, Selection, and Placement	SPP	S			S
5 1 9	Material relating to actions concerning both employees and			ĺ		
	the general public.		1	OTHER	in	
				PT NIIIR	H _i	
	AUTHORIZATION: Recommendation of Management			Lilui	10	
00 11	Delowity Discoment Drogram	SPOR	S			·s
E-20-11	Priority Placement Program	3. 3.	_			
	(a) Material relating to priority placement for					
	consideration for vacant positions (for example, employees			1		
	who were previously downgraded by RIF or changes in			1		ı
	positions).		•			
				İ		
	(b) Case files.	SPOP	A			A
				ULVIDII	4P	
	AUTHORIZATION: Recommendation of Management			renun	T D	
E-20-12	Employment Applications	SPO	2yrs			A
	Applications (Standard Form 171) and related records,	AX				
	excluding materials relating to appointments requiring					
	Senatorial confirmation and applications resulting in					1
	appointments which are filed in the Official Personnel Folder	•				
	AUTHORIZATION: GRS 1/15					
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORAGE		IN OFFICE		
			OFFICE	BPA	FRC	OFFICE		
PE-20-13	Offers of Employment			ļ				
	Offers of employment to potential employees.		i •					
		SPO	See Dispos	11100				
	(a) Accepted offers		See praboa	SICION				
	Discoulding Dockmy immediately	XA						
	Disposition: Destroy immediately.			,				
	AUTHORIZATION: GRS 1/4(a)					•		
. •	The state of the s							
	(b) Declined offers	SPO	See Dispos	ition				
		ΧA						
	Disposition: For names received on Certificate of							
	Eligibles, return to OPM or certifying office with reply					.1		
	and application; for temporary and excepted appointments,					1		
	file inside application; for all others, destroy immediately.		•			 		
	AUTHORIZATION: GR6 1/4(b)	ļ						
	NOTION IN 17 I (U)		i					
E-20-14	Suitability for Employment	SPO	3yrs	J'a Mail	No.	s		
	Case files relating to the application of suitability	ХÀ		8				
	criteria.		:	PLINE	110			
				PFNIII	NI:			
1	AUTHORIZATION: Recommendation of Management			LIIUI	ITU	•		
E 20 15		SPO	A+6vrs			L		
48-411-17	Material relating to interviews with employees.	хA						
				:	· () ***			
	AUTHORIZATION: GRS 1/8							
		l L		<u> </u>	<u> </u>	」 ,		

See Section 800.8 for explanation of 61.7 ferms.

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T PERSONNEL

04-15-88 DOE/NARA

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A FILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		IN OFFICE	STOR/ BPA	GE FAC	IN OFFICE
E-21	Recruitment and Examining	SPOP	S	gant agraphic and control of the second cont		S
.	Material relating to recruitment of positions open to the	SPOC				
•	general public other than tertiary subjects listed below.	ХA		PENDI	NG	
	<u>AUTHORIZATION</u> : Recommendation of Management			ILITUI	TU	
B-21-11	Delegations of Examining Authority	SPOP	Α	//		
	Material relating to agreements between OPM and BPA to			Withrown		
	authorize recruitment and rating for positions at BPA.			DENDI	NC	
	AUTHORIZATION: Recommendation of Management			ILITUII	10	
E-21-13	Direct-Hire Programs	SPO	s		i i	s
,	Material relating to competitive and noncompetitive	SPP				
	employment processes and programs. Includes Engineer	ΧA				1
	Direct Hire Program.			PENDIN	lc	
	<u>AUTHORIZATION</u> : Recommendation of Management			LIVE	, u	
1-14	PACE/PAC Positions	SPOF	5yrs			·
	Material relating to entry at the GS-5 and GS-7 level,				,	
	including authorizations, correspondence, and permission			بالعراب أرابا	量子	
	to use program.			OFLINIA		
	<u>AUTHORIZATION</u> : Recommendation of Management			PENUIT	16	
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			OFFICE	BPA	FRC	OFFICE		
PE-21-15	Tests and Evaluations	SPOF	3yrs	2yrs	<u> </u>			
	Material relating to the testing of candidates.		W.te	nacion	L	\		
				ULMUI	710	1		
	AUTHORIZATION: Recommendation of Management			LLIYIII	11			
				, 6,,,,,	7.0			
PE-21-16	Certificate of Bligibles	SPO	-2vro					
	Certificates of eligibles with related requests, forms,	хA						
·	and statements from applicants and selecting officials.							
	and dealerments are applications and account of the contraction of the							
·	AUTHORIZATION: CRS 1/5	<u> </u>						
						1		
PE-21-17	Examining System Registers	SPOR	See Dispos	sition				
	Material relating to rated applications which are recruited		-	Lawn				
	from the general public and held for referral to positions	·	, With	reason.				
	under competitive examining procedures.					1		
	Disposition: Move application to Inastive status if]]				· ·		
	applicant fails to respond to inquiry or does not update					Í		
	application at one year intervals. Destroy inactive			1				
	applications after one year. Destroy both active and				1 9	· ·		
	inactive applications when register is terminated.	ł			1.4.	1		
						,		
	AUTHORIZATION: Recommendation of Management			DEMNI	NL .			
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A PILE GUIDE AND RETENTION SCHEDULE

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		OF	OFFICE OF RECORD			OTHER COPIE
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORAGE		iN .
			OFFICE	BPA	FRC	OFFICE
E-21-18	Certification Files					
	Requests for recruitment or certification of names from a register which include the position description, job analysis to document rating factors, applications, and related material such as clearances, objections, forms. Includes the original Standard Porm 39, Request for Certificate of Eligibles.			Hackwa	i	
	(a) OPM delegated authority	SPOP	5yrs			
	(b) DOE and BPA authority	SPOC	2yrs			
	(b) DOE and BPA authority	хA	-,			
	AUTHORIZATION: Recommendation of Management			DENNI	NC	
E-21-19	Record/Register Cards	SPOP		LITUI	PAER	
	Cards used to document the application status and scores	+ 1	ω_{i}	thdrawn		
	of applicants.					
	(a) Applicants in register		A+2yre			
	(b) Applicants for specific recruitment	,	See Dispos	ition		
į	Disposition: Maintain with certification file.		·	LYIDIA	in _	
	AUTHORIZATION: Recommendation of Management			ENUIN	b	·
	•					

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION		IN	IN STORAGE		IN		
		NECOND	OFFICE	BPA	FRC	OFFICE		
PE-22	Qualification Requirements	SPP	S			S		
	Material relating to Handbook 118, Qualifications Standards	, ,				1		
	for Positions under General Schedule, requirements and related			i				
	material and requests for exceptions and proposed changes.		\dot{q}	ř .	l.			
	Includes comments on draft qualification standards;		4		F4B			
	professional licensing requirements and implications;							
	qualification appeals, challenges, and inquiries; career			1				
	development agreements; and medical qualification requirements.	•		APMIN	10	·		
•	Case file by FPM chapter number or alphabetically by topic.			PENDI	MI.			
	Case file by the chapter number of arbumpericaril by cobin-			I LIIVI	IU			
	AUTHORIZATION: Recommendation of Management							
PE-23	Intern Programs	SPP	S			s		
FB-23	Material relating to formally designated programs and			l				
	correspondence for approvals. Includes Presidential							
•	Management Interns, career interns, and similar programs.		_					
	Case files are included in Official Personnel Folder.			BEMINIA	IC .	·		
				'Enuin	U			
	AUTHORIZATION: Recommendation of Management		•					
PE-24	Training	SPR	See Dispo	sition				
FD-24	Material relating to employee development programs and		_					
	courses offered by BPA, other Federal agencies, and	1						
	private institutions.			1				
	pilvado importante de la companya del companya de la companya del companya de la		,		ľ	1		
	Disposition: In accordance with instructions for specific					·		
	material described by the following tertiary subjects.					1		
	macorial apparatus of any resemble and any		·					
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			OFFICE	ВРА	FRC	OFFICE
PE-24-18	Employee Development-Sponsored Training Programs Material relating to institutionalized programs such as New Employee Orientation, Executive Development, Management and Middle Management Development Programs among others. Case file alphabetically by name of program. AUTHORIZATION: Recommendation of Management	SPR	A+5yrs	PENDI	IG	A
PE-24-19	BPA-sponsored Training	SPR	A+5vrs			
	Material relating to the establishment and operation of training courses and conferences, including course announcements. 29a AUTHORIZATION: GRS 1/38(1)(1)				'1	
PE-24-20	Other-than-BPA-sponsored Training Material relating to the availability of training and employee participation in training programs sponsored by other governmental agencies or nongovernmental institutions. Includes material captured on BPA's Automated Training System (ATS).	SPR	5yrs or S			s
	AUTHORIZATION: CRS 1/30(e) 1/296					

A - FIRST LETTER IN AREA OFFICE ROUTING (I., T, U, W)

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BPA RECORDS MANUAL

CHAPTER

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A FILE GUIDE AND RETENTION SCHEDULE

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Training Aids/Course Contents			ļ		<u> </u>	
(a) One copy of each manual, syllabus, textbook, and other	Z	S w	THBRAWN		S	
training aids, including objectives and course contents					i	
developed by the BPA. Office of Record is often SPR.				ĺ	ł	
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institutions. Office of Record is often SPR. Non-/ecord	1			[.		
AUTHORIZATION: GRS. 2/20(2)/11/1/27	1					
Porformance Management	SDD	lure			1	
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AUTHORIZATION: Recommendation of Management	1		DEMNI	M!		
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Non-SBS Employee Performance File System Records					 	
appraisals are filed in the Ufficial Personnel Folder.					{	
(a) Appraisals of unaccentable performance where a notice	SPOR	-See Dienos	sition	;		
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	(a) One copy of each manual, syllabus, textbook, and other training aids, including objectives and course contents developed by the BPA. Office of Record is often SPR. (b) Training aids from other Federal agencies and private institutions. Office of Record is often SPR. Non-record AUTHORIZATION: GRO N/2012/(1) (1) Performance Management Material relating to program requirements for performance management. Case file by name of appraisal system or FPM chapter number. AUTHORIZATION: Recommendation of Management	(a) One copy of each manual, syllabus, textbook, and other training aids, including objectives and course contents developed by the BPA. Office of Record is often SPR. (b) Training aids from other Pederal agencies and private institutions. Office of Record is often SPR. pon-/econd AUTHORIZATION: GES 1/20(2)(1)(1)(2) Performance Management Material relating to program requirements for performance management. Case file by name of appraisal system or FPM chapter number. AUTHORIZATION: Recommendation of Management Non-SES Employee Performance File System Records Completed performance appraisals and related material for non-SES appointees as defined in 5 USC 4301(2). Completed appraisals are filed in the Official Personnel Folder. (a) Appraisals of unacceptable performance, where a notice of proposed demotion or removal is issued but not effected, xA	(a) One copy of each manual, syllabus, textbook, and other training aids, including objectives and course contents developed by the BPA. Office of Record is often SPR. (b) Training aids from other Federal agencies and private institutions. Office of Record is often SPR. Pom-/ecord AUTHORIZATION: GRS 2/20(2)(1)(1)(1)(2) Performance Management Material relating to program requirements for performance management. Case file by name of appraisal system or FPM chapter number. AUTHORIZATION: Recommendation of Management Non-SES Employee Performance File System Records Completed performance appraisals and related material for non-SES appointees as defined in 5 USC 4301(2). Completed appraisals are filed in the Official Personnel Folder. (a) Appraisals of unacceptable performance, where a notice of proposed demotion or removal is issued but not effected, xA	(a) One copy of each manual, syllabus, textbook, and other training aids, including objectives and course contents developed by the BPA. Office of Record is often SPR. (b) Training aids from other Federal agencies and private institutions. Office of Record is often SPR. Non-record AUTHORIZATION: GEO 1/26/20/(1/5/3) Performance Management Material relating to program requirements for performance management. Case file by name of appraisal system or FPM chapter number. AUTHORIZATION: Recommendation of Management Non-SES Employee Performance File System Records Completed performance appraisals and related material for non-SES appointees as defined in 5 USC 4301(2). Completed appraisals are filed in the Official Personnel Folder. (a) Appraisals of unacceptable performance, where a notice of proposed demotion or removal is issued but not effected,	(a) One copy of each manual, syllabus, textbook, and other training aids, including objectives and course contents developed by the BPA. Office of Record is often SPR. (b) Training aids from other Federal agencies and private institutions. Office of Record is often SPR. Pom-/cord AUTHORIZATION: GEO Private (1988) (1988) Material relating to program requirements for performance management. Case file by name of appraisal system or FPM chapter number. AUTHORIZATION: Recommendation of Management Non-SES Employee Performance File System Records Completed performance appraisals and related material for non-SES appointees as defined in 5 USC 4301(2). Completed appraisals are filed in the Official Personnel Folder. (a) Appraisals of unacceptable performance, where a notice of proposed demotion or removal is issued but not effected, XA	

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E-25-14	Disposition: Destroy after the employee completes 1 year	· ·		-		<u> </u>
cont.)	of acceptable performance from the date of the written					}
	advance notice of proposed removal or reduction in grade					
	<pre>_ notice.</pre>					
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	AUTHORIZATION: GRS 1/23(a)(1)			1		
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	(b) Performance records superseded through an	SPOD	S	ĺ		s
j	administrative, judicial, or quasi-judicial procedure.	хA		İ	1	J
	AUTHORIZATION: GRS 1/23(a)(2)			İ	ļ	j
				.		
	(c) Performance related records pertaining to a former	SPOD	3yrs			A
:	employee.	XA	or A			
	AUTHORIZATION: GRS 1/23(a)(3)					Į.
		√ I				
	(d) All other summary performance appraisals records,	SPOR	3yrs			A
	including performance appraisals and job elements and	XA T				1
	standards upon which they are based.	'				
				11	i di ta	1
	AUTHORIZATION: GRS 1/23(a)(4)					
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	(e) Supporting documents	z	3yrs			A
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	AUTHORIZATION: GRS 1/23(a)(5)					
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A FILE GUIDE AND RETENTION SCHEDULE

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PE-25-15	SES Employee Performance File System Records			 	ļ		
	Completed performance appraisals and related material for						
	Senior Executive Service (SES) appointees as defined in						
	5 USC 3132a(2). Completed appraisals are filed in the	* .					
	Official Personnel Folder.			1.			
				14143			
Í	(a) Performance records superseded through an	SPOD	S				
	administrative, judicial, or quasi-judicial procedure.						
				1			
i	AUTHORIZATION: GRS 1/23(b)(1)		,	1		ŀ	
	(1) The Common Control of the Common	SPOD	See Dispos	1			
	(b) Performance related records pertaining to a former	SPOD	See prapos	SICION			
	SES appointee.			1	ļ	'	
	Disposition: PENDING (according to GRS)						
	Disposition. This its (according to one)					,	
	AUTHORIZATION: GRS 1/23(b)(2)] }				,	
	(c) All other performance appraisals with the job elements	SPOD	See Dispos	ition		A ·	
	and standards (job exceptions) upon which they are based.						
		i 1				ł	
	Disposition: Destroy 5 years after date of appraisal,						
	exclusive of any interim service as a Presidential appointee.						
İ							
	AUTHORIZATION: GRS 1/23(b)(3)					1	
			Euro			L ,	
	(d) Supporting documents	Z	5yrs	}		**	
	AUTHORIZATION: CRS 1/23(b)(4)			ļ			
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PE-26	Employee Awards and Recognition	SPR	See Dispo	sition		
	Material relating to awards presented to or recognition					
	given Pederal employees.					
	Disposition: In accordance with instructions for specific					
	material described by the following subjects.			,		
PE-26-14	Employee Recognition Program	SPR	3yrs			A
	Material including the preparation, publicity, and		-		.	}
	participation in Employee Recognition Day and similar					
	activities.]
-	AUTHORIZATION: GRS 1/13					}
PE-26-15	Length of Service	SPR	lyr			A
	Material relating to computation of service and sick leave			1814		Ī
	awards, and lists of awardees.	$\downarrow \downarrow$ [₩ 1 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4	1100	i
	AUTHORIZATION: GRS 1/12(b)					,
E-26-16	Letters of Commendation or Appreciation	SPR	2yrs			A
	Copies of letters recognizing length of service and		•		·	
	retirement, and letters of appreciation and commendation]		
	excluding copies filed in the Official Personnel Folder.					
	AUTHORIZATION: GRS 1/12(c)		· · · · · · · · · · · · · · · · · · ·			
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PE-28-12	Position Classification Standards	an an ann ann an Aire ann an Aire an A		W W. W	1	
-	(a) Standards or guidelines issued by OPM and used to	SPO	S			s
	classify and evaluate positions for series and grade level.	ХÀ	_			1 ~
	AUTHORIZATION: GRS 1/7(a)(1)					
	(b) Material relating to the development of standards for			,	No.	
1	classification of positions peculiar to the agency and OPM			1 , 114	\$	
I	approval or disapproval.			ľ		
	approval or arrapproval					
,	(1) Case files	SPQ	S+5yrs			İ
		ΧÀ		į		
l						
	(2) Review file	SPO	2yrs			
		хA	•			*
	AUTHORIZATION: GRS 1/7(a)(2)(a)&(b)				-	
pp 20 12	Series SubcodesGS Positions	SPOD	s			
PE-28-13	Material relating to coding of positions for General	SPOD	5			S
	Schedule series as required by the PAY/PERS system.		A	4		•
	Schedule series as required by the Partyrans system.			DEMINI	NG	
	AUTHORIZATION: Recommendation of Management			TLITUI	NU	
	nother and to he commended to the factor					
PE-28-14	Position Descriptions	SPO	S+2yrs	3yrs		s
	Material describing established positions including	хA				
	information on title, series, grade, duties, and					1
	responsibilities.			-		
	AUTHORIZATION: GRS 1/7(b)	- 				

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n_28-16	Classification Appeals	SPO	A+3yrs	<u> </u>		
	Employee or agency-instituted appeals.					
	AUTHORIZATION: GRS 1/7(d)					
E-28-17	Classification Studies and Surveys					
	(a) Classification survey reports. Survey reports on	SPO	3yrs			
	various positions prepared by classification specialists,	ХA				
	including periodic reports.					
	(b) Inspection, audit, and survey file. Material relating	SPO	s			s
	to inspections, surveys, desk audits, and evaluations.	хA	•			\bot
	AUTHORIZATION: CRS 1/7(c)(1)8(2)	-				
E-29	Hourly Job Evaluation	SPOC	S			S
	Material relating to sets of duties assigned hourly positions.			ULMUI	NO	,
	AUTHORIZATION: Recommendation of Management			PENDI	NU	
E-29-11	Job Standards	SPOC	s			s
	Material relating to duties set by labor agreements.					
•	AUTHORIZATION: Recommendation of Management			DENN	NC	
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PE-30	Pay Administration General and administrative material relating to the various pay plans and schedules. Case file by pay system or FPM	SPP	S		10	S		
	chapter number. AUTHORIZATION: Recommendation of Management		. •	PENDI	NG			
PE-31	Hours of Duty	SPP	S	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	· · · · · · · · · · · · · · · · · · ·	s		
	Material relating to policies and procedures concerning various government-approved work schedules. Includes							
	flexitime, part-time, and alternative work schedules. Case file by title of program or by PPM chapter number.			PENDIN	G			
	AUTHORIZATION: Recommendation of Management							
PE-32	Attendance and Leave Material relating to accrual and eligibility for leave,	SPP	S			S		
	administrative dismissal, hazardous weather policy, leave without pay, and various types of leave such as annual, sick,							
	court, maternity, and military. See also FI-18, Time and Attendance Reporting.			DENDI	1C			
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PB-33	<u>Pund-Raising and Community Outreach</u>	SPP	6			 s 		
	Material relating to programs such as the Combined Federal	SA		1				
	Campaign (CFC), blood drives, and U.S. Savings Bond drives.			DEVIDI	NL	1		
	GRS 237C			LEMM				
	AUTHORIZATION: Recommendation of Management				स १५ मा इ.स. १५			
DD 24	Tabon Managament Delations	GPL			1			
PE-34	Labor-Management Relations Material relating to the relationship between management	DPU	- Syre or S			7-0-		
- T	and employee unions and other groups.		or s					
	and emproyee unions and other groups.					• •		
	AUTHORIZATION: GRS 1/29 1/08					1		
	merination one system					1		
PE-34-15	Labor Unions	SPL	A+5vrs					
	Material relating to employee unions such as contracts and							
	negotiated agreements. Case file alphabetically by name							
	of union.					Į.		
	1/2 0			1				
-	AUTHORIZATION: GRS 1/29(a) 1/28	-				ł		
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PE-34-16	Labor Arbitration Decisions	SPL	A+5yrs	\perp		S		
	Material relating to decisions resulting from labor							
	arbitration.							
	AUTHORISATION: GRS 1/39(a) 1/08		i					
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PB-34-17	Grievance and Labor Arbitration	SPL SPL	A+5yre			-G
	Case files consisting of grievances and resulting	}	_			
	arbitration.					
	1/28	,				
	AUTHORIZATION: GRS 1/29(b) (10-0					
				11 1 40	h ·	
E-35	Employee Organizations and Activities	Z	S	ļ		S
	Material relating to employee organizations such as the					
	Professional Engineers in Government (PEG), Society of					1
	Concerned Engineers (SCE), and Northwest Federal Employees					
	Association ("Associates").			ATAINI	MV	1
				PENDI	Y	•
	AUTHORIZATION: Recommendation of Management			1 -110		j
P-36	Bqual Employment Opportunity	HA	- 2yrs	1yr		-lyr
	Desumentation relating to all aspects of administering the		or S			or S
	federally mandated equal opportunity program at BPAL					
	Includes special emphasis programs, observances of special					
	events, monitoring and reporting, and discrimination					1
•	complaints.					
	1/250					
	AUTHORIZATION: GRS 1/26(g) (10)					
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E-36-11	Programs	AH	2yrs	lyr		lyr
	Special emphasis programs managed by the BPA EEO office,		or S			or S
	including the Federal Women's Program and the Hispanic					
	Employment Program. File alphabetically by program name.			DENINI	NG .	i
				TENUI	TU]
	<u>AUTHORIZATION</u> : Recommendation of Management					1

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E-36-12	<u>Observances</u>	AH	2yrs	lyr	}	lyr		
	Activities held to celebrate holidays and for recognition		or S			or S		
	relating to civil rights and employment, including Martin	1				1		
•	Luther King Holiday and Hispanic Heritage Week. File alphabetically by activity name.			OFLIDE	NA			
	alphabetically by activity name.			PENDI	NI.			
<i>,</i> •	AUTHORIZATION: Recommendation of Management			ILITUI	IU	1		
	NOTHORIBATION. Recommendation of Hanagement							
E-36-13	Outreach	АН	2yrs	lyr	1	s		
	Contacts with schools, community groups for the purpose of		or S					
	generating interest in careers at BPA. Includes career					,		
	fairs, speeches at schools, and seminars. File							
	alphabetically by name of contact.			ULYIDI	NU			
	1			PENDI	Niv			
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P-26-14	Discrimination Complaints	на	A+4vrs			٠,		
30 11	Documentation of complaints of discrimination filed by DOE							
	or BPA employees and applicants. Includes contacts,		•		}			
	consultations, precomplaint, and formal complaint		÷					
	processing. File by assigned number.							
	NUMBER ZAMION. CDS 1/254					· I		
	AUTHORIZATION: GRS 1/26(a) 1/03							
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PE-37	Political Activity of Federal Employees	SPP	S	, [S		
	Material relating to restrictions on political activity			1				
	under the Hatch Act.			ATAIN	10	1		
	AUTHORIZATION: Recommendation of Management			L FVIII	NI.]		
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PE-38	Pinancial Disclosure Requirements		···				
	Reports and related documents submitted by individuals as						
	required under the Ethics in Government Act of 1978, Public Law 95-521.						
	(a) Records including Standard Form 278A for individuals	AP	A+lyr				
	filing according to Section 201b of the Act, and not						
	subsequently confirmed by the US Senate.			,		!	
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	(b) All other records, including Standard Form 278.	AP	A+6yrs				
	(c) All other statements of employment and financial	AP	A+2yrs				
	interests and related records.	,					
	AUTHORIZATION: CRS 1/25 1/24						
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PE-39	Employee Conduct and Bthics	AP	-9		ļ	 s	
	Material relating to codes of ethics and standards of					I	
	conduct for Pederal employees.					1 .	
	GRS 1/2/			-DEMOI	MC		
	AUTHORIZATION: DOE 1/28			T LIYUI	NU -		
PE-39-12	Conflict of Interest	AP	A+2yrs	.]]	
	Statements of past employment, current financial						
	interests, and related material as required for specified						
	BPA employees.			BENDE	110		
				PHNIII	NI.		
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FILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE	
PE-41	Voluntary Separations and Reductions in Grade/Rank/Pay Material relating to actions such as resignations, separations, and changes to lower grade when such actions are voluntary and not due to reduction in force or employee performance. AUTHORIZATION: Recommendation of Management	SPP	S	PEND	NG	S	
PE-43	Adverse Actions/Discipline	SPO	A+4yrs		ļ		
	Case files and related records created in reviewing an adverse advice (disciplinary or nondisciplinary removal, suspension, leave without pay, or reduction-in-force) against an employee. The file includes a copy of the proposed adverse action with supporting papers; statements of witnesses; employee's reply; hearing notices, reports, and decisions; reversal of action; and appeal records, excluding letters of reprimand. AUTHORIZATION: GRS 1/31(b)			يا يهارن ا	No. of the Control of		
PE-42-11	Unacceptable Performance Actions Case files and related records created in reviewing performance-based actions as defined in 5 USC 432. Includes a copy of the proposed action with supporting documents; statements of witnesses; employee's reply; hearing notice(s); reports and decisions; reversal of action; and appeal records.	SPO	A+4yrs			A	

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FILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FAC	OFFICE
PE-42-12	Reduction in Force					`
	Material relating to policies and procedures about					
	reductions in force (RIFs), including retention registers.					
	(a) Registers from which reduction-in-force actions have been taken.	SPO	2yrs			
	(b) Registers from which no reduction-in-force actions have been taken.	SP0	<u>s</u>			
	AUTHORIZATION: GRS 1/17(b)(1)&(2)					
PE-42-14	Grade and Pay Retention Material relating to entitlement to grade and pay	SPO	A+4yrs			,
	retention during reduction in force or other adverse					
	action procedures.			-	10	l
		1		UL NIIII		
	AUTHORIZATION: Recommendation of Management	í		i Filnii	TL)	
0 -43	Grievances and Appeals	SPOD	A+3vrs			<u> </u>
	Review of grievance and appeals raised by agency employees,	SPL	. -			
-	except EEO complaints. Case files include statements of			- [
	witnesses, reports of interviews and hearings, examiner's		•		•	
	findings and recommendations, a copy of the original decision,					
	exhibits, and material relating to a reconsideration request.					
	Includes grievances under both administrative and negotiated					
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BPA RECORDS MANUAL

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A FILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FRC	OFFICE	
PE-43	procedures. Discipline-related material and appeals to the					_	
(cont.)	Merit Systems Protection Board (MSPB) maintained by SPOD;				ļ		
ļ	nondiscipline-related material maintained by SPL. See also						
	PE-28-16, Classification Appeals.		•	1	i		
	NUMBER TARTION. CDC MARKET 1/30a						
	AUTHORIZATION: GRS 1/31(a) //30a	-					
DB 44	Taiuru Componentier	SP	s			s	
PE-44	Injury Compensation	SP	3		-	1 3	
	Material relating to claims under the Office of Workers				ĺ		
	Compensation Programs (OWCP). See also PE-53, Personal Injury.]]		ULTIVI	NO		
	AUTHORIZATION: Recommendation of Management			HIMIN	NL		
	AUTHORIZATION: Recommendation of Management	i i		PITO	1007		
PE-44-11	Chargeback Billings	SP	5yrs	H. CORVI H	Ė		
PE-44-11	Material relating to costs of compensation made under	SP	DAT P			Ĭ	
	OWCP claims.	}		·	ļ	Į.	
	OWCI CIGINO.			BELLDI	110	1	
	AUTHORIZATION: Recommendation of Management	1		PŁNUI	NI.		
	nother than the commendation of management			LINUI	1417		
PE-44-12	OWCP Cases	SP	A+5yrs				
	Material relating to individual employees with OWCP claims.	xA .	-		}	Į.	
}							
	AUTHORIZATION: Recommendation of Management.			ULTIVIT	In		
				PENDI	N.		
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		055105	RETENTION PERIOD					
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			OFFICE	BPA '	FRC	OFFICE		
E-45	Retirement System Material relating to policies concerning governmental retirement systems including Social Security, Medicare, Federal Employees Retirement System (FERS), and Civil Service Retirement System (CSRS). Case file by name of system or by FPM chapter number. See also FI-19-21, Retirements.	SPP	S	ENDIA	ıc	S		
·	<u>AUTHORIZATION</u> : Recommendation of Management		·					
E-46	Health Program	SPRE	See Dispo	sition		 		
	Material relating to employee medical and counseling services and the operation of health facilities. Disposition: Per FPM Bulletin 293-31, retain for duration of employment. Do not destroy. Forward to next employing agency with the OPF or transfer those records not required for filing in the OPF to a local Federal Records Center.		•					
E-46-11	AUTHORIZATION: GRS 1/21 Individual Health Records Cards which contain such information as date of employee's visit, diagnosis, and treatment. These records are the property of and are controlled by U.S. Public Health Service.	SPRE	See Dispo	sition				
,	property of and are concreted by		. 1 -	18494-93				

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			OFFICE	BPA	FRC	OFFICE		
RP-34-14	Coordination Agreement	- RP	See RP-3	Disposi	ion			
RP-35	Losses	RP	A+2yrs		5yrs	A		
	AUTHORIZATION: Recommendation of Management			PFNN	NC			
RP-36	Peak Loads	RP	S+2yrs	LITE	3yrs	s		
♣.	AUTHORIZATION: Recommendation of Management			PFNN	NG			
RP-36-11	Load Factors	RP	See RP-36	Disposi	ion			
2 feet RP-36-12	Diversity Factors	RP	See RP-36	Disposi	ion			
RP-36-13	Load Shapes	RP	See RP-36	Disposi	ion			
RP-37	Weather Adjustments	RP	S+2yrs		3yrs	S		
	AUTHORIZATION: Recommendation of Management		P	ENDI	VG .			
<u>-38</u>	Sum of Utilities	RP	See Dispo	eition_	-			
	Case file chronologically by year of study.		WIT	THORAWN		1		
	(a) Published documents and forecasts.							
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RESOURCE PLANNING AND FORECASTING

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			OFFICE	BPA	FRC	OFFICE
r-32-11	Model Conservation Standards	RP	See RP-32	Disposit	ion	
RP-32-12	Program Savings Estimates	RP	See RP-32	Disposit	ion	
	Case file by program.		i			
P-33	Demand Side Management	RP	A+2yrs		5yrs	A
	AUTHORIZATION: Recommendation of Management		P	ENDI	NG	
D-34	Short Term Porecasts and Analyses	RP	See Dispos	ition		
	Within tertiary subjects, case file chronologically by year.		WITE	BRAWN		
	Published documents and forecasts.					
i	Disposition: Approximately 5 linear feet retained in]
	alphabetical or numerical order with an annual accumulation					
	of 1 linear foot. Transfer to FRC when ten years old.	•				
	Offer to NARA in 5-year blocks when 25 years old.					
·	(b) Supporting documentation		2yrs		5yrs	A
	AUTHORIZATION: Recommendation of Management	+	P	NNIN	IÇ.	
P-34-11	Direct Service Industries	RP	See RP-34	Disposit	ion	
P-34-12	Generating Publics	RP	See RP-34	Disposit	ton	
P-34-13	Nongenerating Publics	RP RP	See RP-34	Disposit	ion	

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORAGE		IN		
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P-30-11	Northwest Power Planning Council	RP	See RP-30	Disposit	ion			
P-30-12	Pacific Northwest Utilities Conference Committee	RP	See RP-30	Disposit	ion			
P-30-13	Internal	RP	See RP-30	Disposit	ion			
P-31 .	Methodological Development and Integration	RP	A+2yrs		5yrs	s		
.,	AUTHORIZATION: Recommendation of Management		P	ENDI	NC:			
P-31-11	Internal Planning	RP	S+2yrs		5yrs	s		
•	AUTHORIZATION: Recommendation of Management		P	FNDI	NG			
P-31-12	Contracts Case files.	RP	A+2yrs		5yrs	A		
	AUTHORIZATION: Recommendation of Management		P	ENDII	NÇ			
2-31-13	Issue/Sector Case Files.	RP	A+2yrs	ı. l	5yrs	A		
	<u>AUTHORIZATION</u> : Recommendation of Management		P	ENDIN	IG	:		
2-32	Conservation Issue Forecasts	RP	A+2yrs		5yrs	Α		
	AUTHORIZATION: Recommendation of Management		p	FNNI	NG			

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			OFFICE	BPA	FRC	OFFICE		
29	Economic Forecasts	RPC	See Dispo	sition				
	Case file by draft, final and year, using subjects below. (a) Published documents and forecasts. Disposition: Approximately 10 linear feet retained in		WITHÐ	NAWN				
	alphabetical or numerical order with an annual accumulation of 2 linear feet. Transfer to FRC when ten years old. Offer to NARA in 5-year blocks when 25 years old.							
	(b) Supporting documentation		2yrs		5yrs	A		
	AUTHORIZATION: Recommendation of Management	,	•	PENDI	NG			
RP-29-11	Summary AUTHORIZATION: Recommendation of Management	RPC	^{2yrs}	ENDI	VG	A		
RP-29-12	National Economics	RPC	See RP-29	Disposi	ion			
RP-29-13	Regional Economics	RPC	See RP-29	Disposi	ion			
RP-29-14	Demographics	RPC	See RP-29	Disposi	ion			
RP-29-15	Fuel Prices	RPC	See RP-29	Disposi	ion	 		
RP-30	Comparisons to Other Forecasts	RP	3yrs	2yrs	5yrs	s		
	AUTHORIZATION: Recommendation of Management		· P	FNNIN				

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RP-28	Disposition: Approximately 10 linear feet retained in						
(cont.)	alphabetical or numerical order with an annual accumulation		1417111	PRAWN			
	of 2 linear feet. Transfer to FRC when ten years old.		WILL	TANK!			
	Offer to NARA in 5-year blocks when 25 years old.				1	i	
	(b) Supporting documentation	+	2yrs		5yrs	A	
				-	ALC:		
12	AUTHORIZATION: Recommendation of Management			4-NII			
				LIIUI	IIV		
RP-28-11	Summary	RP	2yrs	3yrs		A	
_	Includes plans and schedules.						
12. 0			1	TIO	NIA	1	
<i>.</i>	AUTHORIZATION: Recommendation of Management			7	INI:		
•				LITU	IIIU		
RP-28-12	Residential	RP	See RP-28	Disposi	tion	l	
1					1	İ	
RP-28-13	Commercial	RP	See RP-28	Disposi	tion	1	
			•	-			
RP-28-14	Industrial	RP	See RP-28	Disposi	tion		
	Case file by specific industry.	'		-			
•							
RP-28-15	Irrigation	RR	See RP-28	Disposi	tion		
						•	
RP-28-16	Direct Service Industry	RP	See RP-28	Disposi	tion		
	Case file by specific direct service industry (DSI) or plant.			—			
<u>, </u>						·	
RP-28-17	Miscellaneous Loads	RP	See RP-28	Disposi	tion	1	
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			OFFICE	BPA	FRC	OFFICE		
26-17	State	RPC	See RP-26	Disposi	ion			
P-26-18	Tribal	RPC	See RP-26	Disposit	ion			
P-27	Utilization Data	RPC	S	-		s		
•	AUTHORIZATION: Recommendation of Management		P	ENDI	NG			
P-27-11	Domestic	RPC	See RP-27	Disposit	ion			
P-27-12	Commercial	RPC	See RP-27	Disposit	ion			
P-27-13	Industrial/Non-Direct Service Industry	RPC	See RP-27	Disposit	ion			
P-27-14	Industrial/Direct Service Industry	RPC	See RP-27	Disposit	ion			
27-15	Diversity Pactors	RPC	See RP-27	Disposit	ion			
P-27-16	Load Pactors	RPC	See RP-27	Disposit	ion			
P-28	Load Porecasts	RPC	See Dispos	ition		λ		
	Case file by draft, final, and year, using tertiary subjects below.		WITH	RAWN				
	(a) Published documents and forecasts.	·						
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RP-25-13	Data Requests and Responses	RP	A+lyr	İ		A		
	AUTHORIZATION: Recommendation of Management			PENDI	NC			
				I LIIVI	IIU	•		
RP-25-14	Study Types/Methodology/Models	RP	S+2yrs			s		
	Capacity and energy computer modeling techniques,							
	development and utilization. Case file by type.			חראחו	NIA			
M.	AUTHORIZATION: Recommendation of Management			PENDI	NG			
RP-26	Utility/Customer Basic Data	RPC	s			s		
	File all basic data, including load projections received	1						
•	from customers, using tertiary subjects below.		1	וחווחו	MA			
	<u>AUTHORIZATION</u> : Recommendation of Management			PENDI	NG			
RP-26-11	<u>Utilities</u>	RPC	See RP-2	6 Disposi	ion			
RP-26-12	Direct Service Industries-Aluminum	RPC	See RP-2	6 Disposi	ion			
26-13	Direct Service Industries-Other	RPC	See RP-2	6 Disposi	ion			
RP-26-14	Other Industries	RPC	See RP-2	6 Disposi	ion			
RP-26-15	Agricultural/Irrigation	RPC	See RP-2	6 Disposi	ion			
RP-26-16	<u>Federal</u>	RPC	See RP-2	6 Disposi	ion			

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RP-24-12	Evaluation Guidelines	RPP	S			S	
	AUTHORIZATION: Recommendation of Management			PENDI	NG		
RP-24-13	Data Requests and Responses	RPP	A+lyr			A	
	AUTHORIZATION: Recommendation of Management			PFNNI	NG		
RP-24-14	Project Types/Methodology/Models	RPP	S+2yrs	LIIDI	IIU	s	
	Case file by type.		1	TIME	NO		
	AUTHORIZATION: Recommendation of Management			YENUI	Nu		
RP-25	Power Studies Consists of data, decision analysis background and results	RP	A+2yrs	, , ,	5yrs	S,	
	of power studies. Case file alphabetically by study name						
	or by type of study. Use tertiary subjects below. Index		(TIINI	MO		
İ	all studies.			PENDI	Nh		
	AUTHORIZATION: Recommendation of Management		'		114		
RP-25-11	Unsolicited Proposals	RP	3yrs				
•	AUTHORIZATION: Recommendation of Management			PEND	NG		
RP-25-12	Study Guidelines	RP	S			s	
	AUTHORIZATION: Recommendation of Management			PENDI	NG		

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RESOURCE PLANNING AND FORECASTING

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A FILE GUIDE AND RETENTION SCHEDULE

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		RECORD	OFFICE	BPA	FAC	OFFICE		
RP-24	Disposition: Transfer to FRC when no longer active or no							
(cont.)	longer has potential for activity. Offer to NARA in 5-year blocks when 20 years old. Approximately 300 linear feet and 10 vertical feet of map files retained in alphabetical or		WITH	DNAWN				
-	numerical order with an annual accumulation of 20 linear feet and 0.5 vertical feet.		•	PENDI	NC			
## 	AUTHORIZATION: FERC ITI/I(C)(3) (b) Specific economic evaluations and analyses of potential	RPP		LINDI	Mu			
e en en en en en en en en en en en en en	power projects including the Washington Nuclear Power projects. Case file alphabetically by project name or numerically by project file number. Use tertiary subjects below.		WITH	DRAWN				
· · · · · · · · · · · · · · · · · · ·	<u>Disposition</u> : Transfer to FRC when no longer active or no longer has potential for activity. Offer to NARA in 5-year blocks when 20 years old. Approximately 8 linear feet							
•	retained in alphabetical or numerical order with an annual accumulation of 3 linear feet.			PENDI	NG			
	AUTHORIZATION: Recommendation of Management							
RP-24-11	Unsolicited Proposals	RPP	3yrs					
	<u>AUTHORIZATION</u> : Recommendation of Management	·		PENDI	NG			

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			OFFICE	BPA	FRC	OFFICE		
RP-23-12	Peaking Studies Capacity studies and sales, total system and individual long term capacity development and analysis.	RPS	A+2yrs	: !	8yrs	s		
	AUTHORIZATION: BPA Records Schedule & Files Handbook POM-39							
RP-23-13	Monthly Power Situation	RPS	15yrs	. 41		2yrs		
	Includes energy load forecasting.	PS		ENNI	NC			
	AUTHORIZATION: Recommendation of Management		Ţ	LIIVI	IIU			
RP-23-14	Load/Resource Balance Pacific Northwest loads and resources study, rate case studies and related documents.	RPS	See Dispos	ition		S+2yrs		
	Disposition: Destroy published studies when 25 years old. Destroy supporting data 10 years after study published. Destroy computer printouts when 10 years old.		·.					
	<u>AUTHORIZATION</u> : BPA Records Schedule & Files Handbook POM-36							
P-24	Power Projects					4		
	(a) FERC license applications and supporting material such	PG	See Dispos	ition		A		
	as notices and maps of specific hydroelectric projects filed	RPEC						
	by the BPA with the FERC. Case file alphabetically by	1						
	project name or numerically by project file number.	 						
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US DEPARTMENT OF ENERGY BONNEVILLE POWER ADMINISTR

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P-22-15	Streamflow	RPS	S+2yrs		20yrs	S		
	Data relating to historical modified streamflows, actual					ì		
_	runoff experience and estimated long term flows.			ATMINI	MU	1		
•				KHNIII	NL			
	AUTHORIZATION: Recommendation of Management			LITE	,,,	Ī		
P-22-16	Headwater/Downstream Determinations	RPS	A+2yrs		10yrs	Α		
	Data relating to determinations of headwater benefits		_					
-	and payment.			MENDI	MV.	J		
*				Prain	Y			
•	AUTHORIZATION: Recommendation of Management			Figure				
2-23	Load Studies/Study Types .	RPS	S			s		
23	File general material about load studies here. File	1.00						
	specific load studies using the following subjects. When							
ė,	material pertains to specific projects or studies that are							
	indexed at RP-24 or RP-25, file in those locations or			:				
	cross-reference material in both locations. Cross reference					İ		
	location of all computer printouts.			nruni	NU			
		,		PENDI	Y			
	AUTHORIZATION: Recommendation of Management							
P-23-11	Chudu Doguesha	RPS	A+lyr			۱ ۵		
,-23-11	Study Requests	RPS	MATAT			 ^		
	AUTHORIZATION: Recommendation of Management							
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CHAPTER

TRESOURCE PLANNING AND PORECASTING

RP-15

D 04-15-88
T DOE/NARA

APILE GUIDE AND RETENTION SCHEDULE

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RP-22	Water Resources Basic Data	RP	S			s	
	Case file by using the following tertiary subjects. See						
	also RP-24, Power Project Evaluations and Analyses and				l		
	RP-25, Power Studies.			DEMDI	ML		
	·			PENDI	NI.		
	AUTHORIZATION: Recommendation of Management	ì	,			ł	
					5 ,		
RP-22-11	<u>Depletion</u>	RP	See RP-22	Disposit	ion		
	Data relating to streamflow depletion due to irrigation,						
	evaporation, drought, and other conditions and situations.	,					
P−22−12	Pumped Storage	RP	Coo DD 33	D44 A			
.6 -22-12	Data relating to pumped storage sites, including	RP	See RP-22	pisposit	TON		
	generation and pumping capability.						
	delieracion and bumbing capability.						
22-13	Ploods and Plood Control	RPS	S+2yrs			s	
	Data relating to flood control requirements.			1			
				DEMDI	MO		
	AUTHORIZATION: Recommendation of Management			PFNIII	Ni	İ	
				LIVE	110		
P-22-14	Storage	RP	S+2yrs	9	,	S	
	Data relating to site storage capabilities.		•	'			
3					, The state of the	1	
	AUTHORIZATION: Recommendation of Management		•	PAIDIA			
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See Section 800.8 for explanation of KLY terms

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APILE GUIDE AND RETENTION SCHEDULE

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RP-21-15	Hydroelectric	RP RM	See RP-21	Disposit	ion			
21-16	Biomass	RP RM	See RP-21	Disposit	ion			
P-21-17	Cogeneration	RP RM	See RP-21	Disposit	ion			
RP-21-18	Nuclear	RP RM	See RP-21	Disposit	ion			
RP-21-19	HydroelectricSecondary Material relating to production and marketing of secondary hydroelectric power.	RP	See RP-21	Disposit	ion			
	<u>AUTHORIZATION</u> : Recommendation of Management			ENDIN	G			
RP-21-20	Conservation	RM	See RP-21	Disposit	ion,			
e-21-21	Potential and New Resources Resources not listed above. Case file as needed.	RP RM	See RP-21	Disposit	ion			
RP-21-22	Generation and Sales Statistics	RMG	See RP-21	Disposit	ion			
RP-21-23	Generation Equipment Technology issues and advances.	RMG	See RP-21	Disposit	ion			

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RP-20-13	Potential Hydroelectric Power	RP RM	See RP-20	Disposit	ion		
RP-20-14	Efficiency Improvements	RP RM	See RP-20	Disposit	ion		
RP-20-15	Options .	RP	See RP-20	Disposit	ion		
RP-21	Energy and Capacity Resources Basic Data Data and information related to resource technologies,	RP RM	A+2yrs		5yrs	A	
	operating characteristics and research and development. AUTHORIZATION: Recommendation of Management			PENDI	NG		
RP-21-11	Geothermal Regional data base and summary of legal and institutional factors in various jurisdictions.	RP RM	See RP-21	Disposit	ion		
RP-21-12	Thermal/Fossil Material relating to both thermal and fossil fueled generating resources.	RP RM	See RP-21	Disposit	ion		
RP-21-13	Solar	RP RM	See RP-21	Disposit	ion		
RP-21-14	Wind Regional database and summary of legal and institutional factors in various jurisdictions.	RP RM	See RP-21	Disposit	ion		

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P-19	Income Analysis	RPC	A+5yrs			Α		
	Material relating to income analysis. See also RP-24, Power							
	Project Evaluations and Analyses, and RP-25, Power Studies.		1	DE MONS	in	1		
				PFNIII				
	AUTHORIZATION: Recommendation of Management			i Filmi	YU	ł		
				ĺ				
P-19-11 .	Analytical Tools/Modeling Techniques	RPC	S+2yrs		11	s		
				AFAIDI	10			
1÷	AUTHORIZATION: Recommendation of Management			N-VIII	NI.			
7,8				ILITUI	IIU	· I		
P-19-12	Marketing	RPC	λ	5yrs	5yrs	. A		
e.a. ,	Material relating to analysis of capacity and energy				· ·			
•	computer modeling techniques, development and utilization.			1	′	•		
				DEMINI	110			
	<u>AUTHORIZATION</u> : Recommendation of Management			PHNIII	Nk	ł		
				PIID	110			
P-20	Non-Federal Development at Federal Facilities	RP	A+3yrs		5yrs	A		
	File general material using the following tertiary subjects.							
_	See also RP-24, Power Project Evaluations and Analyses and					1		
	RP-25, Power Studies.			ULTINI	NV			
				Prain	Nh			
	AUTHORIZATION: Recommendation of Management				•••			
				. L				
P-20-11	<u>Financing</u>	RP	See RP-20	Disposit	cion			
- 00 10	Market al 1311 a.		0 00 01	, .		1		
P-20-12	Marketability	RP	See RP-20	Disposi	th ou	1		
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P-17-16	Tracking	RP	S+3yra			s		
	Periodic surveys of resource specific technology and							
	institutional trends and accomplishments			DEMON	In			
	No.			FFNIII	41.			
	AUTHORIZATION: Recommendation of Management			PILE				
RP-18	Cook Analysis	RPP	A+5yrs	18.				
(L-10	Cost Analysis Material relating to cost analysis. See also RP-24, Power	1	H.SILO			-		
•	Project Evaluations and Analyses and RP-25, Power Studies.		<u>:</u>	-		1		
	, in the second and single second and second			PENDI	MI.			
	AUTHORIZATION: Recommendation of Management			LITUI	ĮΙÜ			
	·			·	*			
P-18-11	Analytical Tools/Modeling Techniques	RPP	S+2yrs			s		
				DEMON	110			
	AUTHORIZATION: Recommendation of Management	,		PHNIII				
2-18-12	God Wife at Lyonaga	RPP	A+4yrs	FIRM	5yrs	۱ ۸		
P-18-12	Cost-Effectiveness	RPP	VAAATO	-	3713	^		
	AUTHORIZATION: Recommendation of Management			DLNIII	M!			
				I TIINI	ITU			
RP-18-13	Marginal Costs	RPP	A+5yrs		10yrs	λ		
	Consists of documentation, such as rate analyses, used to					İ		
	derive BPA marginal cost estimates					l		
				AFME	110			
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RP-17-11	Acquisition Methods	RP	A+5yrs		10yrs	Α		
	Documentation of terms and conditions of purchase				,			
	agreements outside BPA. Case file by resource types.			APAINI	10			
				PFNIII	MI.	1		
	AUTHORIZATION: Recommendation of Management			I LITUI	MU	1		
P-17-12	Small Resources Program	RP	A+5yrs		10yrs	A		
	Documentation of issues and criteria for acquisitions by			1				
	any party and in various states.							
, in				OLIUII	10			
	AUTHORIZATION: Recommendation of Management			Praini	U Y			
· ***				1 -11-11	•			
P-17-13	Lost Opportunity Resources	RP	A+3yrs		5yrs	Α		
	Material relating to programs, policies, evaluation				ĺ	1		
.	criteria and similar documentation for lost opportunity							
₹.	generating resources.			GENDI	In	1		
				REMIII				
	AUTHORIZATION: Recommendation of Management			PILDI	w	1		
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17-14	Displacement	RP '	A+3yrs		5yrs	λ		
				ACUDI				
	AUTHORIZATION: Recommendation of Management			DFWIII				
İ				ILITUI	ITU			
P-17-15	Pre-Construction Assistance Program	RP	λ+3yrs		5yrs	λ		
	AUTHORIZATION: Recommendation of Management							
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Assured Operating Plan Hydroelectric Studies	RPS	See Dispo	sition	ļ	S		
Disposition: Transfer to FRC 10 years after year in which created. Offer to NARA in 5-year blocks when 20 years old. Maintain microfilm (COM) for 30 years or until no longer needed, whichever comes first. Approximately 6 linear feet retained in chronological order with an annual accumulation of 2 linear feet. AUTHORIZATION: Recommendation of Management		WITI	PENDI	NG			
Detailed Operating Plan Detailed operating plan (DOP) and supporting documents. Approximately 2 linear feet retained in chronological order with an annual accumulation of 1 linear foot.	RPS		-	sition			
Entity Report Approximately 1 linear foot retained in chronological order with an annual accumulation of 1 linear foot.	RPS		T .	sition			
Resource Acquisitions Material relating to resource acquisitions. See also RP-24, Power Project Evaluations and Analyses and RP-25, Power Studies. AUTHORIZATION: Recommendation of Management	RP	A+3yrs	PFNNI	5yrs	A		
	Disposition: Transfer to PRC 10 years after year in which ereated. Offer to NARA in 5-year blocks when 20 years old. Maintain microfilm (COM) for 30 years or until no longer needed, whichever comes first. Approximately 6 linear feet retained in chronological order with an annual accumulation of 2 linear feet. AUTHORIZATION: Recommendation of Management Detailed Operating Plan Detailed operating plan (DOP) and supporting documents. Approximately 2 linear feet retained in chronological order with an annual accumulation of 1 linear foot. Entity Report Approximately 1 linear foot retained in chronological order with an annual accumulation of 1 linear foot. Resource Acquisitions Material relating to resource acquisitions. See also RP-24, Power Project Evaluations and Analyses and RP-25,	Assured Operating Plan Hydroelectric Studies Disposition: Transfer to PRC 10 years after year in which steated. Offer to NARA in 5-year blocks when 20 years old. Maintain microfilm (COM) for 30 years or until no longer needed, whichever comes first. Approximately 6 linear feet retained in chronological order with an annual accumulation of 2 linear feet. AUTHORIZATION: Recommendation of Management Detailed Operating Plan Detailed operating plan (DOP) and supporting documents. Approximately 2 linear feet retained in chronological order with an annual accumulation of 1 linear foot. Entity Report Approximately 1 linear foot retained in chronological order with an annual accumulation of 1 linear foot. Resource Acquisitions Material relating to resource acquisitions. See also RP-24, Power Project Evaluations and Analyses and RP-25,	Assured Operating Plan Hydroelectric Studies Disposition: Transfer to FRC 10 years after year in which steated. Offer to NARA in 5-year blocks when 20 years old. Maintain microfilm (COM) for 30 years or until no longer needed, which steated in chronological order with an annual accumulation of 2 linear feet. AUTHORIZATION: Recommendation of Management Detailed Operating Plan Detailed Operating plan (DOP) and supporting documents. Approximately 2 linear feet retained in chronological order with an annual accumulation of 1 linear foot. Entity Report Approximately 1 linear foot retained in chronological order with an annual accumulation of 1 linear foot. Resource Acquisitions Material relating to resource acquisitions. See also RP-24, Power Project Evaluations and Analyses and RP-25,	Assured Operating Plan Hydroelectric Studies Disposition: Transfer to PRC 10 years after year in which excated. Offer to NARA in 5-year blocks when 20 years old. Maintain microfilm (COM) for 30 years or until no longer needed, whichever comes first. Approximately 6 linear feet retained in chronological order with an annual accumulation of 2 linear feet. AUTHORIZATION: Recommendation of Management Detailed Operating Plan Detailed Operating plan (DOP) and supporting documents. Approximately 2 linear feet retained in chronological order with an annual accumulation of 1 linear foot. Entity Report Approximately 1 linear foot retained in chronological order with an annual accumulation of 1 linear foot. Resource Acquisitions Material relating to resource acquisitions. See also RP-24, Power Project Evaluations and Analyses and RP-25,	Assured Operating Plan Hydroelectric Studies Disposition: Transfer to PRC 10 years after year in which steated. Offer to NARA in 5-year blocks when 20 years old. Maintain microfilm (COM) for 30 years or until no longer needed, whichever comes first. Approximately 6 linear feet retained in chronological order with an annual accumulation of 2 linear feet. AUTHORIZATION: Recommendation of Management Detailed Operating Plan Detailed operating plan (DOP) and supporting documents. Approximately 2 linear feet retained in chronological order with an annual accumulation of 1 linear foot. Entity Report Approximately 1 linear foot retained in chronological order with an annual accumulation of 1 linear foot. Resource Acquisitions Resource Acquisitions Resource Acquisitions Records Office Of RECORD OFFICE OFFICE OFF		

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AFILE GUIDE AND RETENTION SCHEDULE

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₽-16-16	Plant Data	RPS	S			s		
	Data received from Canada for use in studies and models.	•			10	1		
				PENDI		i.		
	AUTHORIZATION: Recommendation of Management			LLIAN	TU			
P-16-17	Hydrometeorology	RPS	See Dispo	sition	i	s		
	Data, policy, and procedures related to hydroelectric		_	NI HDRAWN		ł		
*	meteorology. Does not include meeting minutes, agenda, and			WITHDRAWN				
	related material. Approximately 3 linear feet retained in			1				
<i>:</i>	alphabetical order with an annual accumulation of 6 linear							
	inches							
	Disposition: Transfer to FRC 10 years after material is							
	no longer active. Offer to NARA in 5-year blocks when 20		•	1				
, ,	years old.			PENDI	MD			
,		1		PFMIII	Y	•		
-	AUTHORIZATION: Recommendation of Management							
P-16-18	Assured Operating Plan	RPS	See Dispo	sition		s		
	Assured operating plan (AOP) and supporting documentation.	""	occ brope					
	and affecting from their and papersing accommendated							
	Disposition: Transfer to FRC 10 years after year in which		WITH	IDRAWN				
	created. Offer to NARA in 5-year blocks when 20 years old.	7						
	Maintain microfilm (COM) for 30 years or until no longer					i		
	needed, whichever comes first. Approximately 15 linear	i		 		1 .		
	feet retained in chronological order with an annual				-			
]	accumulation of 3 linear feet.		i			1		
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See Section 800 B for explanation of KEY terms

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CHAPTER

810

TRESOURCE PLANNING AND FORECASTING

RP-7

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RP-16-13	Disposition: Transfer to PRC 10 years after material is							
(cont.)	no longer active. Offer to NARA in 5-year blocks when 20		WITH	DRAWN		į		
	years old.		•	PAIDIA	10			
			μ.	'F NIIIR				
	AUTHORIZATION: Recommendation of Management		. •	LIMI	10			
RP-16-14	Downstream Benefits	RPS	See Dispo	Bition		5yrs		
	Special studies and reports. Approximately 5 linear feet			1		_		
	retained in alphabetical order with an annual accumulation		. with	DRAWN	-			
	of 1 linear foot.							
			i					
	Disposition: Transfer to FRC 10 years after material is no]				
	longer active. Offer to NARA in 5-year blocks when 20			PAIDI				
Į	years old.	ŀ	·	ENDI				
				LITUII	JU	1		
	AUTHORIZATION: Recommendation of Management				İ			
RP-16-15	Storage and Storage Requests	RPS	See Dispo	sition		5yrs		
	Special requests, studies, and reports. Approximately 6		_			1 -7		
,	linear feet retained in alphabetical order with an annual		VIII)	IDRAWN		I		
'	accumulation of 1 linear foot.							
				\downarrow				
	Disposition: Transfer to FRC 3 years after material is no		•					
	longer active. Offer to NARA in 5-year blocks when 20				\			
	years old.	'				1		
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	AUTHORIZATION: Recommendation of Management			LIJUI	NU			
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RP-6

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P-15-18	Western Systems Power Pool	RP.	See RP-15	Disposit	ion			
	Material relating to the Western Systems Power Pool (WSPP).							
-16	Columbia River Treaty	RPS				1		
	All treaty-related material including Columbia River Treaty			1				
	(CRT), Permanent Engineering Board (PEB), and Permanent							
	Engineering Board Committee (PEBCOM). Use the following							
49	tertiary subjects and dispositions, filing material							
	alphabetically by name or title.			, ,				
P-16-11	Canadian Projects	RPS	A+3yrs		10yrs	3yrs		
	Material relating to existing and new Canadian projects.				10,10	","		
			4	TIME	IO			
	AUTHORIZATION: Recommendation of Management			PENDI				
			•	LIIVI	TU	1		
P-16-12	U.S. Projects	RPS	A+3yrs		10yrs	3yrs		
	Material relating to existing and new U.S. projects.		_		l			
				BEMUI	MU	1		
	AUTHORIZATION: Recommendation of Management			renui	VY			
			•			1		
-16-13	Agreements	RPS	See Dispos	ition		5yre		
	Special agreements, related to the treaty, between the		WITHDRAW	L		1		
	U.S. and Canada. Approximately 8 linear feet retained			T .		1		
,	in alphabetical order with an annual accumulation of 1			 				
	linear foot.							
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RP.	Disposition: Destroy when superceded, no longer required			<u> </u>				
teont.)	for reference, or when 10 years old, whichever is sooner.			PENDI	NG	·		
	<u>AUTHORIZATION</u> : Recommendation of Management		h	theraw	142			
RP-15-11	Intertie Development and Use	ŘP	See RP-15	Disposit	ion			
RP-15-12	Northern Interties Material relating to development and use of interties (IDU) with Canada (not related to RP-15-16, BC Hydro).	RP	See RP-15	Disposit	ion			
RP-15-13	Eastern Interties Material relating to interties with Idaho, Montana, Utah, Wyoming, and other states to the east.	RP	See RP-15	Disposit	ion			
RP-15-14	Southern Interties Material relating to interties with California and the Inland Southwest.	RP	See RP-15	Disposit	ion			
RP-15-15	Third AC Intertie	RP	See RP-15	Disposit	ion	l		
RP-15-16	British Columbia Hydro Material relating to non-treaty policies and studies of interties with British Columbia Hydro (BCH) (not related to RP-15-12, Northern Interties).	RP	See RP-15	Disposit	ion			
RP-15-17	Loop Flow Material relating to system and individual utility load and resource data.	RP	See RP-15	Disposit	ion			

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RP-14-13	Nonfirm Surplus	RP	S	2yrs		S		
	Material relating to availability of nonfirm surplus							
	hydroelectric energy.			ULMUI	MU	i		
	_			Praisi	Mi	1		
	AUTHORIZATION: Recommendation of Management			Pilbi		`		
P-15	Planning for Interties and Interconnections	RP	See Dispo	sition	ļ	s		
· · ·	Material relating to the development of policies,		withd	mur				
	procedures and agreements and the development and analysis		00.100	"7"				
	of intertie marketing and operational alternatives. Within							
<i>li.</i>	tertiary subjects case file alphabetically by name of			·				
William	intertie or interconnection. See also ED-14, Interties,		•					
	and OP-13, Operation of Interties and Interconnections.							
9	(a) Correspondence and other material establishing BPA			4.5	1.	,		
	policies and procedures governing interties and			"	ľ			
	interconnections. Approximately 15 linear feet retained			ŀ	1			
	in alphabetical order with an annual accumulation of		*					
_	3 linear feet.	_						
						1		
	<u>Disposition</u> : Transfer to FRC when no longer active and							
,	offer to NARA when 20 years old.	1 1		\downarrow		·		
•	(b) Correspondence regarding format and content of							
	agreements, prototype agreements, letter agreements,			· ·		1		
	and other related matters except when concerning a							
	specific contract.							
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P_3-13	Supply Curves	RPP	A+3yrs		5yrs	s		
	Material relating to the assessment of resource costs and		_ ·			1		
	availabilities.			MENDI	IU			
	·			H-MIII	1	1		
	AUTHORIZATION: Recommendation of Management			FILTER	7 U			
P-13-14	Responses to Resource Program Proposals	RPP	λ+3yrs		5yrs	s		
				APHIDI	10			
	AUTHORIZATION: Recommendation of Management			H-WIII				
				LITUI	IU	.		
P-14	Energy and Capacity Types	RP	S	2yrs	4.	s		
	Material relating to the availability of various types of				i par	_		
	electrical power, including studies, reports, and tables.			AFAIDA				
	* g			DLAIII	M.			
	AUTHORIZATION: Recommendation of Management			I LITUI	ITU			
_		.						
1-11	Pirm	RP	S	2yrs		ls		
	Material relating to availability of total system firm							
	energy or capacity and hydroelectric system firm energy							
	or capacity.			ULTIDIT	IU			
		l		PENIII	H			
	AUTHORIZATION: Recommendation of Management			PHON	Ų			
P-14-12	Pirm Surplus	RP	S	2yrs		s		
·	Material relating to availability of total system firm		_	2,10] "		
	surplus energy or capacity.			DEMINIA	In	İ		
				PHNIIIN				
	AUTHORIZATION: Recommendation of Management			I PIAMA	U			
	The state of the s			l i				

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			OFFICE	BPA	FRC	OFFICE					
P-11	Power Plan Issues	RPP	A+3yrs		5yrs	s					
	Material relating to the NW Power Planning Council's (NWPPC)										
	Power Plan and issues of concern, impact, or interest to BPA.			-							
	Case file by issue.			PENDI							
				ILIIDI	ΠÜ	1					
	AUTHORIZATION: Recommendation of Management										
74			_								
P-12	Responses to NWPPC Two-Year Action Plan	RPP	A+3yrs	1. 3	5yrs	S					
	Material relating to the Northwest Power Planning Council's										
,	Action Plan and BPA's Workplan. Case file by year and title.	'		AFIIDI	MO						
,=·	NUMBER OF THE PROPERTY OF THE			PHNII	N.	·					
. '	AUTHORIZATION: Recommendation of Management			4 Pismi	110						
P-13	Posourge Program	RPP	A+3yrs		5yrs	s					
F-13	Resource Program Material relating to development of annual resource program.	KEE	N. J. L.		13113						
	indicital foldering to development of disidal fedorate programs			PAID	10	1					
	AUTHORIZATION: Recommendation of Management			PENDI	NI.						
				FILM	IIU						
P <u>-</u> 13-11	Integrated Resource Planning	RPP	A+3yrs		5yrs	s					
				ACHOL	10						
	AUTHORIZATION: Recommendation of Management			NEW!!!	ML						
				ILITUI	TU						
P=13-12		RPP	S+lyr		5yra	 3 					
	Description and ranking of Primary Resource Sites and		٧	ITH PRAWIE							
	Potentials. Includes development methodologies.										
	AUMUODI ZAMION. Decemberdation of Management	+		DEMDI	MV						
	<u>AUTHORIZATION</u> : Recommendation of Management			T LITUH	TI						

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See Section 800-8 for explanation of KLY terms

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			OFFICE	BPA	PHU	OFFICE			
	RESOURCE PLANNING AND FORECASTING		See Dispos	ition		A+lyr			
•	Material relating to resource planning and forecasting,	i							
•	including BPA's resource strategy and generation studies.			舞者 直對達	W.				
	Data may be recorded on various media including paper, film,				''				
	tape, disk, or diskette, unless otherwise specified in the				•				
	narrative disposition.								
	Disposition: In accordance with instructions for specific	l l							
	material described by the following related subjects.			傳送 非自然的	1.5				
	material described by the fortowing related subjects				, r				
•	AUTHORIZATION: Recommendation of Management								
	All temporary records under the primary subject "Resource				,				
	Planning and Porecasting* with retention periods of 5		•						
	years and longer are justified because of (a) the need to			H 1 161	456				
	support program and policy decisions to the Northwest Power								
	Planning Council; and (b) the need to document decisions	1 1		,					
	in light of the potential for lawsuits against BPA.								
	2 and 2 and 2 and 2 and 2 and 3 and 4 and		s.						
	All permanent records under the primary subject "Resource		•						
	Planning and Forecasting are justified because of (a)	· •							
	the Columbia River Treaty which documents with Canada the annual operating and planning data needed permanently for								
	historical purposes; and (b) published forecasts which are								
	needed to provide an historical record of data bases and		•						
	of the bases for rate and income decisions.				‡ §				
	OF CHE DEBES FOR FREE WING THOUSE RECEPTIONS				gl	1			
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POWER MARKETING

PM-11

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	1		OFFICE	BPA	FRC	OFFICE		
PM-15-12	Outyear Forecasts	PML	See PM-15	Disposi	ion			
PM-15-13	Revenue Forecasts Includes Non-Firm Revenue Analysis Program-Revenue Estimates (NFRAP-REVEST) printouts.	PML	See PM-15	Disposi	ion			
PM-16	Rate Filings and Hearings Includes all material related to rate filings and hearings. Case file by year of filing. Do not include duplicate copies. See also FI-28, Revenue Requirements, and FI-29, Repayment.	PML	See Dispo	sition *}	曹	A		
	<u>Disposition</u> : When no longer active, transfer to PRC until 50 years old, then destroy.			PENDI	NG	·		
	AUTHORIZATION: FERC III/I(B)(3)					,		
H-16-11	Schedules and Charts	PML	See PM-16	Disposi	ion			
PM-16-12	Exparte	PML	See PM-16	Disposi	ion	i L		
PM-16-13	Official Record Case file by year of rate filing using numerical index.	PML	See PM-16	Disposi	ion			
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See Section 800.8 for explanation of KLY terms

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		OFFICE	BPA	FRC	OFFICE		
Cost of Service Analysis	PMI.	See PM-14	Disposit	ion			
Marginal Cost Analysis	PML	See PM-14	Disposit	ion			
Transmission Rate Design Study	PML	See PM-14	Disposit	ion			
Long Range Incremental Cost	PML	See PM-14	Disposit	ion			
Low Density Discount	PML	See PM-14	Disposit	ion			
Customer Schedules and Studies	PML	See PM-14	Disposit	on			
Retail Industrial Market	PML	See PM-14	Disposit	on			
Washington Nuclear Projects	PML.	See PM-14	Disposit	OI			
Rate Porecasts Case file rate forecasts using the following tertiary subjects as needed.	PML	See Dispos	ition		A		
Disposition: Destroy 5 years after adopted or effective or 10 years from date of forecast, whichever is sooner. AUTHORIZATION: Recommendation of Management			PFNDI	NC	·		
Load Porecasts	PML	See PM-15	Disposit	ion			
	Cost of Service Analysis Marginal Cost Analysis Transmission Rate Design Study Long Range Incremental Cost Low Density Discount Customer Schedules and Studies Retail Industrial Market Washington Nuclear Projects Rate Forecasts Case file rate forecasts using the following tertiary subjects as needed. Disposition: Destroy 5 years after adopted or effective or 10 years from date of forecast, whichever is sooner. AUTHORIZATION: Recommendation of Management	Cost of Service Analysis Marginal Cost Analysis PML Transmission Rate Design Study Long Range Incremental Cost Low Density Discount Customer Schedules and Studies Retail Industrial Market PML Washington Nuclear Projects Case file rate forecasts using the following tertiary subjects as needed. Disposition: Destroy 5 years after adopted or effective or 10 years from date of forecast, whichever is sooner. AUTHORIZATION: Recommendation of Management	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION OF RECORD OF	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION OFFICE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION OFFICE OF RECORD N		

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			OFFICE	BPA	FRC	OFFICE		
PN-14	Rate Analysis	DML			ļ			
	Case file by using the following subjects as needed.	1		1				
	Cross reference location of all computer printouts.		HTIW	DEAWN, "	ti pa	•		
	(a) Correspondence		3yra			A		
	(b) All other hardcopy, including computer printouts		s			s		
	(c) Magnetic tapes, disks, and microfilm		S+5yrs					
	AUTHORIZATION: Recommendation of Management			PFNNI	NG			
PM-14-11	Rate Database Includes Revenue Information System (RIS) and Variable	PML	See PM-1	Disposi	i on			
	Industrial Historical Data printouts.	·						
PM-14-12	Rate Analysis Model	PML	See PM-1	Disposi	ion			
	Material relating to the rate analysis model (RAM).			1				
PM-14-13	Resource Strategy	PML	See PM-1	Disposi	tion	1		
	Includes all utilities programs resource loads and					1		
	resource strategy runs printouts.			_				
PM-14-14	Supply Pricing Model	PML	See PM-14	Disposi	sion	·		
	Material relating to the supply pricing model (SPM).					\downarrow		
PM-14-15	Resource Decremental Costs	PML	See PM-1	Disposi	ion			
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			OFFICE	BPA	FRC	OFFICE		
M-13-12	Pre-Initial Proposal	PML	2yrs		3yrs	S		
·	AUTHORIZATION: Recommendation of Management			PFNNI	NG			
1-13-13	Wholesale Power Rate	PML	See Dispo	sition		A		
1-13-13	Case file all background and supporting material by rate		-					
1	schedule and by year. See also PM-16, Rate Filing and					1		
	Hearings; FI-28, Revenue Requirements; and FI-29, Repayment.							
. %:	Disposition: When no longer active, transfer to PRC until							
.	50 years old, then destroy.			DENDI	No	1		
	AUTHORIZATION: FERC III/I(B)(3)		1	EIIVII	טו			
-13-14	Transmission Power Rate	PML	See Dispo	sition		Α		
	Case file all background and supporting material by rate							
	schedule and by year. See also FI-28, Revenue				947			
į	Requirements, and FI-29, Repayment.		-					
	Disposition: When no longer active, transfer to FRC		•					
' .	until 50 years old, then destroy.			PLNUI	NU			
				PENDI	NI			
	AUTHORIZATION: FERC III/I(B)(3)	1		7				
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Cogeneration	PM	See PM-12	Disposit	l _. on			
Other Power Transactions	PM	See PM-12	Disposit	ion			
Residential Purchase and Exchange	PM .	See PM-12	Disposit	ion			
Conservation	PM	See PM-12	Disposit	lon			
Purchase	PM	See PM-12	Disposit	lon			
Residential Exchange	PM	See PM-12	Disposit	on			
Intertie Assured Access	PM	See PM-12	Disposit	lon			
Construction	RM	See PM-12	Disposit	lon-			
<u>Emergency</u>	PM	See PM-12	Disposit	ion			
Rates	PML	See Dispos	teion				
Disposition: See PM-13 tertiary subjects for disposition.							
Responses to Power Planning Council Requirements	PML ,	S		3yrs.	s		
			ENDIA	IC			
<u>AUTHORIZATION</u> : Recommendation of Management	,	•	LIIVII	()	ł		
	Cogeneration Other Power Transactions Residential Purchase and Exchange Conservation Purchase Residential Exchange Intertie Assured Access Construction Emergency Rates Disposition: See PM-13 tertiary subjects for disposition.	Cogeneration Other Power Transactions Residential Purchase and Exchange Conservation Purchase Residential Exchange Intertie Assured Access Construction Emergency Rates Disposition: See PM-13 tertiary subjects for disposition. Responses to Power Planning Council Requirements Case file by section/subsection of the Act.	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION OFFICE Cogeneration Other Power Transactions Residential Purchase and Exchange Conservation PM See PM-12 Conservation PM See PM-12 Purchase Residential Exchange Intertie Assured Access Construction Emergency PM See PM-12 Rates Disposition: See PM-13 tertiary subjects for disposition. Responses to Power Planning Council Requirements Case file by section/subsection of the Act. PM See PML See PM-12 See Disposition: PML See Disposition: PML See Disposition: PML See PML See PML See PM-12 PML See PM-12	Cogeneration Cogeneration Other Power Transactions Residential Purchase and Exchange Conservation PM See PM-12 Disposit Conservation PM See PM-12 Disposit Conservation PM See PM-12 Disposit Purchase Residential Exchange PM See PM-12 Disposit Intertie Assured Access Construction Emergency Rates Disposition: See PM-13 tertiary subjects for disposition. Responses to Power Planning Council Requirements Case file by section/subsection of the Act.	RECORD SERIES TITLE, DESCRIPTION, AND DISPOSITION OF RECORD OF R		

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PM-12	Disposition: Destroy when superceded, no longer required					1	
cont.)	for reference, or when 10 years old, whichever is sooner.					1	
				DEMNII	NG		
	AUTHORIZATION: Recommendation of Management			LIIVII	NU		
		 	G - DM 10			1	
PM-12-11	Power Sales	PM	See PM-12	pisposic	ion	į	
PM-12-12	Storage	PM	See PM-12	Disposit	ion		
PH-12-12	Storage	1	Dec 1 12	Proposit		• •	
PM-12-13	Exchange	PM	See PM-12	Disposit	on	i	
a.	<u> </u>						
PM-12-14	Exchange Transmission	PM	See PM-12	pisposit	on	1	
						1	
PM-12-15	Service and Exchange	PM	See PM-12	Disposit	ion		
10 16 7	Tour Court over Court of Delahousehle	PM	Coo DM 12	ni annai t			
PM-12-16	Trust/Customer Service Reimbursable	PM	See PM-12	pisbosic	Ton		
PM-12-17	Operation and Maintenance	PM	See PM-12	Disposit	ion		
H-12-17	operation and natheenance	1					
PM	Transmission	PM	See PM-12	Disposit	ion		
		\downarrow					
PM-12-19	<u>Transfer</u>	PM	See PM-12	Disposit	ion		
				1.			
PM-12-20	Voltage Regulator	PM	See PM-12	pisposit	on	İ	
PM-12-21	Loace	PM	See PM-12	Nisposit	on		
:n-12-21	Lease		Dec 111-12	DP051C			
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			OFFICE	BPA	FRC	OFFICE	
0.511-19	Disposition: Store on site 1 year then microfilm and send						
(cont.)	hard copy to FRC for 8 years. Destroy microfilm 20 years,			l .			
	and hard copy 8 years, after end of year originated.		***	, 福志			
		+			ľ		
	AUTHORIZATION: BDA Records Schedule & Piles Handbook PON-16						
ŀ		•				l	
PM-12	Power Transactions	PM	See Dispos	tion			
†	Material relating to type of power transaction including		witi	DRAWN :	· ·		
	policies, procedures, and developmental material. File here	1	47 111	Diameter a g g 15	r.	1	
	or use the following subjects as needed. Within tertiary					1	
	subjects, case file alphabetically by customer name or						
	numerically by sustomer number. Collection includes	1		1		1	
·	approximately 10 linear feet maintained in numerical or						
	alphabetical order. Annual accumulation is 2 linear feet.		,	Par I	r	·	
	alphabetical ofder. Annual accumulation is 2 linear reec.					i	
_	(a) Correspondence and other material establishing BPA			1			
	policies and procedures governing the sale of energy.						
	Disposibles . Mysesfer to DDG when we leave active an	1		}		1	
	Disposition: Transfer to PRC when no longer active and		* •	1 10			
	offer to NARA in 5-year blocks when 20 years old.	1 /	• "	, h	_		
		'		MAIDI	NU		
	AUTHORIZATION: Recommendation of Management			71 NIIII	N N		
			•		10		
	(b) Correspondence regarding format and content of energy	j		_			
1	sales agreements, prototype agreements, letter agreements,	1				t	
	and other related matters, EXCEPT when concerning a						
 	specific contract.	1					
					•	1	
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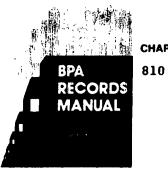
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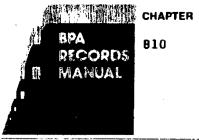
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FILE GUIDE AND RETENTION SCHEDULE

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			OFFICE	BPA	FAC	OFFICE	
1-16	Draft Contract Material	PM	See Dispo	ition		 	
	Material related to contract formulation.	хC	A+lyr				
	Disposition: Executed Contracts, store on site one year;						
	transfer to FRC for life of contract plus 5 years, then destroy. Nonexecuted Contracts, store on site one year,						
	transfer to FRC for 5 years from end of negotiations, then destroy.			3.5.			
1.45.0 1885 2.51.1885	ALIMUODI TAMION DEL DEL COLONIO DEL COLONI				' '		
	AUTHORIZATION: BPA Records Schedule & Files Handbook POM-6						
PM-11-17	Meter_Slips	PM	lyr		7yrs	1yr	
4.	Originals and copies of meter slips. Includes Demand Graph				1,8 pa		
	(DG) charts and Print Demand (PD-57) tapes.				14.4		
	AUTHORIZATION: BPA Records Schedule & Files Handbook POM-16					}	
Ph-11-18	Meter Chart Printouts	PM	lyr	lyr	., 0	lyr	
	Computer printouts of various data related to metering.						
	<u>AUTHORIZATION</u> : BPA Records Schedule & Files Handbook POM-17						
PM-11-19	Billings	PM	See Dispos	ition			
į	Copies of bills, related notes, and correspondence. See	хC	2yrs		8yrs	2yrs	
	also FI-23, Revenue and Receipts, for accounts receivable						
	copy of bill and accounting data.	 				 	
						1	
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			OFFICE	BPA	FRC	OFFICE	
PM-11-13	Contract Administration	PM	See PM-11	Disposit	ion	'	
	Material related to the administering of all contracts.	жС					
PM-11-14	Contracts, Original and Master Authenticated						
	Contracts for all types of power transactions.	-			'		
	(a) Original signed contract. See also PI-27-11, Residential Exchange Invoicing.	DSA	A+lyr		5yra	A+lyr	
	AUTHORIZATION: PERC-18CFR-125.3/7(b)			ENDA	NG		
	(b) Master authenticated contract	PM	See Dispos	ition			
	Disposition: Microfilm when contract is terminated.						
	Destroy hard copy. Review in 25 years and destroy when no longer needed for reference.						
	AUTHORIZATION: BPA Records Schedule & Files Handbook POM-2						
PM-11-15	Contracts, Authenticated Work Copies	PM	A+1yr-			A+1yr	
	Copies for active use in various headquarters organizations and Area Offices.						
	AUTHORIZATION: BPA Records Schedule 5 Piles Handbook POM-4						
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M-11	subjects. For example, Meter Slips may be case filed, by					·		
cont.)	customer name, in a location separate from Billings as is		,					
	the situation at Headquarters Customer Services.							
			*					
	Disposition: The following applies to PM-11's tertiary							
	subjects where the notation "See PM-11 Disposition" occurs:							
	PKCorrespondence and other specific, customer-related							
	material: Store on site 1 year; then microfilm and send							
in.	hard copy to FRC for 8 years. Destroy hard copy when 9			1				
,	years old. Destroy microfiche 5 years after service is					1		
. 5	terminated. Destroy all other material when superseded.							
	terminated. Destroy all other material when superseded.							
	xCCorrespondence and other specific, customer-related							
	material: Store on site 2 years; then transfer to PRC for					i		
	7 years. Destroy when 9 years old. Destroy all other							
	material when superseded.		_	1				
	,		i i	CAIDIA	n			
_	AUTHORIZATION: Recommendation of Management		•	LMIIIK	N .			
4-T1-11	Contract Management System	PM	See PM-11	hisbosit	1 on			
	All material related to contract support activities.	хC						
1-11-12	Contract Development and Negotiation	PM	See PM-11	Disposit	ion			
	All material related to the development of contract policy,	хC						
	principles, and terms and to contract negotiations.							
						İ		
		1			<u> </u>	J		

P - PERMANENT S - SUPERSEDED/OBSOLETE

x - FIRST LETTER IN AREA OFFICE ROUTING (L. 1. U. W)

Z - ORIGINATING OFFICE

PM-1

04-15-88 DOE/NARA

APILE GUIDE AND RETENTION SCHEDULE

		OFFICE	,		ON PERIOD	
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF		CE OF RECO		OTHER COPIES
PILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN		MAGE	IN
			OFFICE	BPA	FRC	OFFICE
H	POWER MARKETING		See Disp	sition		λ+lyr
	Material relating to rate determination, revenue requirements					
	and to customer services such as, contract development and					
	administration for power acquistion, sales, exchange, and					
	transmission; and power billing. Data may be recorded on					
	various media including paper, film, tape, disk, or diskette,				İ	
,	unless otherwise specified in the narrative disposition.					•
•			-			
	<u>Disposition</u> : In accordance with instructions for specific	1			1	
•	material described by the following related subjects.				1	,
					1.	
•	AUTHORIZATION: Recommendation of Management				1.	
	All retentions in this series that are by "Recommendation					
	of Management" are justified as follows: (a) because of				1	
	potential legal challenge of rates and contracts; (b) because				1	1
	of potential of error in billing calculations and need to				1	
	adjust billing amounts; (c) to document decisions for					
	potential Northwest Power Planning Council review.					i
	PERC refers to Federal Energy Regulatory Commission.					i
M-11	Customer Relations	PM	See Dispo	sition		
	Power contracting and power billing related material for	хC			1	s
	specific customers. Case file alphabetically by customer		,			
	name. All material may be filed in one folder or in several				}	1
	folders using recurring subjects as needed. When volume of				1	1.
	material dictates, file may be subdivided by specific contract]
	name or number. Note: Case files, by customer name, or number,					
	may be established using any of the below listed tertiary					
	may be described dorling any or one beautiful accordance to the said			1		ł

A - ACTIVE

See Section 800 B for explanation of KLY terms.

P - PERMANENT

S - SUPERSEDED/OBSOLETE

x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

Z - ORIGINATING OFFICE

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FILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF -	OFFI IN	FICE OF RECORD STORAGE		OTHER COPIES			
		RECORD	OFFICE	BPA	FRC	OFFICE			
E-53-17	Safety Management Reports of inspections, appraisals, audits, studies, tests, and pertinent correspondence maintained by the Safety Office covering unsafe conditions, hazards of criticality, fire hazards, fires, and explosions at BPA worksites. See also SS-18-15, Vandalism, Theft, and Other Incidents.	SI	5yrs	nruni	lio.				
-	<u>AUTHORIZATION</u> : Recommendation of Management			PENDI	NG	·			
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	•					,			
,				事 新春 新	‡				
				A CONTRACTOR	# # # # # # # # # # # # # # # # # # #				
				Activities of the control of the con					
				- 劉 · 科 · 科 · 基達第一	. or 18				

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Z - ORIGINATING OFFICE

BPA RECORDS MANUAL

CHAPTER

T PERSONNEL

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P PE-35

A FILE GUIDE AND RETENTION SCHEDULE

	,	OFFICE	RETENTION PERIOD					
_FILE CODE	DECORDE SERIES TITLE DESCRIPTION AND DISPOSITION	OFFICE	OFFIC	E OF RECOR		OTHER COPIE		
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA	GE	IN		
			OFFICE	BPA	FRC	OFFICE		
E-53-13	Motor Vehicle Accidents	SI	A+6yrs			λ		
	Material relating to accidents involving Federal vehicles or occurring at a BPA facility or BPA right-of-way.		-					
	AUTHORIZATION: GRS 10/5		: 1	Who i'm i'h	×			
E-53-14	Employee Driving Records Material relating to individual employee operations of Government-owned vehicles, including driver tests, authorization to use, safe driving awards, and related correspondence.	SI	A+3yrs			A		
	AUTHORIZATION: GRS 10/4		2, 13, 14, 14, 14, 14, 14, 14, 14, 14, 14, 14	14.54301				
53-15	Employee Claims for Property Loss Material relating to accountability for personal property lost or stolen. See also LW-12-14, Torts.	SI	A+3yrs			A		
	AUTHORIZATION: GRS 48/16(a) (8/15a		1	416145				
E-53-16	Private Party Claims Material relating to accountability for personal property lost or stolen. See also LW-12-14, Torts.	sı	A+3yrs			A		
	AUTHORIZATION: GRS 18/16/at 18/15a							
			•	434				
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S SUPERSEDED/OBSOLETE

See Section 8008 for explanation of Rf. Clerin

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Z. ORIGINATING OFFICE



CHAPTER

T PERSONNEL

D 04-15-88 T DOE/NARA

PE-33

A FILE GUIDE AND RETENTION SCHEDULE

	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE	RETENTION PERIOD					
FILE CODE		OF	OFFI	OTHER COPIE				
TILE CODE	neconds senies title, description, and disposition	RECORD	IN	STORA		IN		
			OFFICE	BPA	FAC	OFFICE		
PE-49	Employee Services	SPRE	5yrs			A		
	Material relating to programs such as smoking cessation,	,	or S					
	fitness facility, and child care.			-				
				Drain	NC			
	AUTHORIZATION: Recommendation of Management		į	TENUI	TU			
			,] `			
PE-50	Career Counseling Program	SPRE	A+3yrs	Ĭ		A		
. ** - *e	Material relating to counseling about career enhancement		٠.					
	opportunities or personal development programs which may		4					
	increase an employee's qualifications for higher-level		ť S	第二日 新まりもおおん				
	positions.			JUVIUIY	n			
				TRIIIN	1			
	AUTHORIZATION: DOE 1/27(a)		. •			1		
PE-51	Rosters/Directories of Professionally Licensed Employees	SPP	S			s		
	Material relating to employees who are licensed or certified	J SF I	•	Ma NaBarr	in the	1		
	by state accredition or similar boards.		_	1 1 1 1 1 1 1 1 1		*		
				DENINIA	ll.			
	AUTHORIZATION: Recommendation of Management			renun	ll):			
			•			1		
E-52	Mobilization Readiness	SPP	<u>s</u>			S		
	Directives and plans issued by BPA, the Federal Emergency		r					
	Management Agency (FEMA), other Rederal agencies, State and							
	local governments, and private sector. Non-record							
				+				
·	AUTHORIZATION: GRS 18/29							
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				-	:	1		

A - ACTIVE

P - PERMANENT S SUPERSEDED/OBSOLETE

 $[\]mathbf{x}$ - FIRST LETTER IN AREA OFFICE HOUTING (L. 1, U. W)

Z - ORIGINATING OFFICE

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D 04-15-88
T DOE/NARA

PE-34

A FILE GUIDE AND RETENTION SCHEDULE

1 1 1 1 1 1		OFFICE	RETENTION PERIOD					
EU E CODE	DECORDS SERIES TITLE DESCRIPTION AND DISPOSITION		OFFIC	E OF RECOR	D	OTHER COPIE		
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	iN	STORA	VGE	IN		
			OFFICE	BPA	FRC	OFFICE		
PE-53	Occupational Safety Program Material relating in general to Occupational Safety Program other than specific material described by the following tertiary subjects.	sı	A	ncaini	MO	A		
	AUTHORIZATION: Recommendation of Management			PENDI	VI)			
PE-53-11	Personal Injury	SI	-5yrs			<u> </u>		
	Material relating to medical and investigatory records about on-the-job injuries whether or not a claim for compensation was made, excluding copies filed in the Official Personnel Folder and copies submitted to the Department of Labor. See also PE-44, Injury Compensation. AUTHORIZATION: GRS 1/32		4 2 9	· · · · · · · · · · · · · · · · · · ·				
PE-53-12	Patalities Material relating to incidents resulting in the death of a Pederal employee or contractor performing duties for BPA; also, material relating to the death of a third party which occurs in a BPA vehicle, at a BPA facility, or on a BPA right-of-way. See also PE-44, Injury Compensation. Disposition: Per FPM Bulletin 293-31, retain for duration	SI	See Dispos	ition .	51			
	of employment. Do not destroy. Forward to next employing agency with the OPF or transfer those records not required for filing in the OPF to a local Federal Records Center. AUTHORIZATION: GRS 1/21		;					

K A - ACTIVE
P - PERMANENT
S - SUPERSEDED/OBSOLETE

See Section 8008 for explanation of KLY terms

BPA 1845 NOV 196

x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

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BPA 810 RECORDS MANUAL

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DOE/NARA

P PE-32

FILE GUIDE AND RETENTION SCHEDULE

100 PM		OFFICE P		RETENTIO	N PERIOD		
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE	· · — · · · · · · · · · · · · · · · · ·	ICE OF RECOR		OTHER COPIES	
FILE CODE	NECONDS SENIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA		OFFICE	
			OFFICE	BPA	FRC	- UFFICE	
E-46-14	Employee Assistance Program Material relating to psychological testing, evaluation, and counseling of employees and their families and files for alcohol and drug abuse counseling.	SPRE	5yrs		7yrs	A	
T-var	AUTHORIZATION: Recommendation of Management. The retention period for this records series is justified as follows: Professionals in this program are bound by American Psychological Association to secure confidential material as generated in this program for 12 years. Yearly accumulation is 1 to 1 1/2 linear feet of paper files.			PENDI	NG		
P-46-16	Statistical Summarice	SPR	2vro				
3	Statistical summaries and reports with related documents about employee health.						
	AUTHORIZATION: GRS 1/22	<u> </u>			. 1		
<u>ve</u> -47	Benefits Page 1	SPP	s	į		s	
	Material relating to policy and procedures governing employee benefit programs such as unemployment benefits, life insurance, health benefits (FEHB), Federal Employees Group Life Insurance (FEGLI), and dental insurance. File by name of program or by FPM chapter number. See also				5		
	FI-19-22, Insurance Deductions. <u>AUTHORIZATION</u> : Recommendation of Management			PENDI	1C		
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A - ACTIVE P - PERMANENT

2 - ORIGINATING OFFICE

x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

S - SUPERSEDED/OBSOLETE

BPA RECORDS MANUAL

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P PE-31

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FILE GUIDE AND RETENTION SCHEDULE

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	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF		CE OF RECOR		OTHER COPIES
FILE CODE RECORDS SERIES	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STOR/ BPA	FRC	OFFICE
			OFFICE	BPA	PHC	OFFICE
E-46-11	Disposition: Per FPM Bulletin 293-31, retain for duration				 	
eqnt.)	of employment. Do not destroy. Forward to next employing	,				
	agency with the OPF or transfer those records not required					
	for filing in the OPF to a local Federal Records Center.					1
						1
ļ	AUTHORIZATION: GRS 1/21					
				1 医牙髓生物	lý å	
E-46-12	Health Unit Controls	SPRE	A+3mos	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 2 A	•
,	Logs or registers reflecting daily number of visits to					1
· · · · · · · · · · · · · · · · · · ·	dispensaries, first-aid rooms, and health units. These					1
•	records are the property of and are controlled by U.S.					1
*	Public Health Service.		,	The Section 2		1
				de ivila	146	1
	AUTHORIZATION: GRS 1/20(a)					
A 13	Employment-related Medical Records	SPO	See Disp	osition		1
6-13	Material relating to an employee's medical history,	XA		ા કે કિંહિ	l w si	1
	occupational injuries or diseases, physical examinations,	\			44	1
	related to an employee's Federal employment. Individual					
	files must be maintained in accordance with Privacy Act					
						I
•	requirements.			\downarrow		
	Disposition: Per FPM Bulletin 293-31, retain for duration					•
	of employment. Do not destroy. Forward to next employing			_		
	agency with the OPF or transfer those records not required					i
	for filing in the OPF to a local Federal Records Center.					1
:	for fifting in the orr to a rocar records most as conserv	·				
	AUTHORIZATION: CRS 1/21			_	 	
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See Section 800.8 for explanation of M.Y. terros.

Z - ORIGINATING OFFICE

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BPA 1845 NOV 1987



CHAPTER

RESOURCE PLANNING AND FORECASTING

P RP-27

DOE/NARA

FILE GUIDE AND RETENTION SCHEDULE

		055105		RETENTIC	N PERIOD	
FILE CODE	DECORDS SERVES TITLE DESCRIPTION AND DISPOSITION	OFFICE		E OF RECOR		OTHER COPIES
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA		IN
	•		OFFICE	8PA	FAC	OFFICE
3.8	Disposition: Approximately 5 linear feet retained in			 		
(cont.)	chronological order with an annual accumulation of 2		w	THORAWN		l
	linear feet. Transfer to FRC when ten years old. Offer		•••			
	to NARA in 5-year blocks when 25 years old.					
	(b) Supporting documentation	+	2yrs		5yrs	A
	AUTHORIZATION: Recommendation of Management			LUQUE	ia	
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BPA 1845 NOV 1987

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CHAPTER

810

TSUPPORT SERVICES

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FILE GUIDE AND RETENTION SCHEDULE

		OFFICE		RETENTIO	N PERIOD	
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF	OFFICE	OF RECOR		OTHER COPIES
_	neconds series title, description, and disposition	RECORD	iN	STORAGE		IN '
			OFFICE	BPA	FRC	OFFICE
	SUPPORT SERVICES Material relating to support service functions, such as correspondence, forms, facilities (buildings), records, reports, mail services, reproduction, and security management. Data may be recorded on various media including paper, film, tape, disk, or diskette, unless otherwise specified in the narrative disposition. Disposition: In accordance with instructions for specific material described by the following related subjects.		See Dispos	ition		A+lyr
-11	Correspondence Management Program Material relating to the Correspondence Management Program.	SSTD	s	TUNI	MO	s
1-11	AUTHORIZATION: Recommendation of Management Administrator's Chronological File		Sura	'ENUI	NU	
	A sharp, reproducible copy of every letter or memorandum signed, approved, or concurred in by the Administrator or Deputy Administrator only. Approximately 4 linear feet of paper files are stored in the work area with an annual accumulation of 2 linear feet. Offer to NARA in 5-year blocks when 20 years old. AUTHORIZATION: BPA Records Schedule & Files Handbook R-13(a)		3,10			
	ANTHONIAGITUM: DEA RECORDS SCHEDULE & FILES HANDDOOK N=13(8)					·

A - ACTIVE

SUPERSEDED/OBSOIL TE

See Section 800.8 for explanation of KEY terms.

P PERMANENT

x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

P SS-2

04-15-88 T DOE/NARA

APILE GUIDE AND RETENTION SCHEDULE

Controlled Mail Log Log of correspondence from elected officials and other government agencies showing BPA-assigned tracking number.	OFFICE OF RECORD	IN OFFICE	CE OF RECOR STORA BPA		OTHER COPIE
Controlled Mail Log Log of correspondence from elected officials and other	RECORD	OFFICE			
Log of correspondence from elected officials and other			ВРА	FRC	
Log of correspondence from elected officials and other	ALG	£			OFFICE
Assessment materials man and another account to the control of the		5yrs			
AUTHORIZATION: Recommendation of Management			PENDI	IC .	
il Services	SSTC			·	4
terial relating to certified, return registered, and spress mail. Also material on sample survey and support cuments required by the U.S. Postal Service (USPS).				(AA)	:
AUTHORIZATION: GRS 12/7		6yrs		•	
o) All other material		lyr			lyr
AUTHORIZATION: GRS 12/5			!		
Mailing/Distribution Lists Request forms and other material relating to changes in BPA's mailing and distribution lists.	Z	or S			S
AUTHORIZATION: GRS 12/5(2) 13/4a					
				į	
	terial relating to certified, return registered, and press mail. Also material on sample survey and support comments required by the U.S. Postal Service (USPS). O USPS samples and support documents AUTHORIZATION: GRS 12/7 All other material AUTHORIZATION: GRS 12/5 Request forms and other material relating to changes in SPA's mailing and distribution lists.	terial relating to certified, return registered, and press mail. Also material on sample survey and support comments required by the U.S. Postal Service (USPS). USPS samples and support documents AUTHORIZATION: GRS 12/7 All other material AUTHORIZATION: GRS 12/5 Request forms and other material relating to changes in SPA's mailing and distribution lists.	terial relating to certified, return registered, and press mail. Also material on sample survey and support (USPS). USPS samples and support documents AUTHORIZATION: GRS 12/7 All other material AUTHORIZATION: GRS 12/5 Mailing/Distribution Lists Request forms and other material relating to changes in GPA's mailing and distribution lists.	L1 Services terial relating to certified, return registered, and press mail. Also material on sample survey and support Comments required by the U.S. Postal Service (USPS). OUTHORIZATION: GRS 12/7 All other material AUTHORIZATION: GRS 12/5 Mailing/Distribution Lists Request forms and other material relating to changes in SPA's mailing and distribution lists.	terial relating to certified, return registered, and press mail. Also material on sample survey and support Cuments required by the U.S. Postal Service (USPS). OUSPS samples and support documents AUTHORIZATION: GRS 12/7 Authorization: GRS 12/5 Mailing/Distribution Lists Request forms and other material relating to changes in SPA's mailing and distribution lists.

A - ACTIVE

P - PERMANENT

S SUPERSEDED/OBSOLETE

x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

2 - ORIGINATING OFFICE

See Section 800 8 for explanation of KLY terns.

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TSUPPORT SERVICES

P 04-15-88

AFILE GUIDE AND RETENTION SCHEDULE

		OFFICE		RETENTIO	ON PERIOD	
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA	NGE .	. IN
	·		OFFICE	BPA	FRC	OFFICE
SS-13	Porms Management "	SSTD			ļ	
	Material relating to the Forms Management Program which covers the initiation, review, and approval of BPA forms. Includes supporting, background, justification, and clearance documents for each BPA form. Also includes inactive forms pending disposal catalog of approved forms, and forms control records.	,	ţ	7 Fe/ p	ļ ^r ī	
	(a) One record copy of each form created by BPA with related instructions and documentation showing inception, scope, and purpose of the form		A or S	5yrs	§	A or S
	AUTHORIZATION: GRS 16/4(a) (6/3a	,				
	(b) Working papers, background materials, requisitions, specifications, processing data, and control records.	. ,	A or S			A or S
	AUTHORIZATION: GRS 16/4(b) (6/36					
5S-14	Facilities Management	SSK	2yrs			
	Material relating to the operation and maintenance of BPA occupied buildings. Includes non-electric plant maintenance issues such as roofing, painting, and grounds care.	MM xD	2,13			
			•			
	AUTHORIZATION: CRS 11/1			 	ļ	
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A . ACTIVE

P - PERMANENT

S SUPERSEDED/OBSOLETE

 \mathbf{x} - FIRST LETTER IN AREA OFFICE ROUTING (L. F. U. W)

Z - ORIGINATING OFFICE

See Section 800 8 for explanation of Kf Y terres

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04-15-88 DOE/NARA

P SS-4

APILE GUIDE AND RETENTION SCHEDULE

		OFFICE		RETENTIO	ON PERIOD	
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF	OFFIC	OTHER COPIE		
		RECORD	IN .	STORAGE		IN OFFICE
			OFFICE	BPA	FRC	OFFICE
S-14-11	Parking	SSK	A+3mos	-	 	
	Material relating to parking issues, including statistics, carpool background information, and problems.					,
	AUTHORIZATION: GRS 11/4(a)				23t	
S-15	Pogordo Managorant	CCMD				
3-13	Records Management Material relating to sreation, maintenance, use, and disposition of records. Includes inventory reports, records	SSTD				
i	schedules, documents supporting transfers and requests for use of records materials.			•		
	(a) Descriptive inventories, disposal authorizations, schedules, and reports.		A			А
	AUTHORIZATION: GRS 16/3(a) 16/2a				rombes efficiences	
	(b) Project background records, including studies, analyses, notes, and interim reports.		A+6mos W	THORAWN		А
	AUTHORIZATION: CRS 15/10		•			
	(c) Records holding reports		3yrs			6
	AUTHORIZATION: CRS 16/6(8) 19 40					
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SUPPORT SERVICES

DOE/NARA

APILE GUIDE AND RETENTION SCHEDULE

		OFFICE			N PERIOD	
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF	OFFICE OF RECORD			OTHER COPIES
THE GODE		RECORD	iN	STORAGE		IN
			OFFICE	BPA	FRC	OFFICE
S-15-11	Paperwork Reduction Act	SSTD	S	 		_s
	Material relating to the Paperwork Reduction Act and the Information Collection Budget (ICB).			·		
	AUTHORIZATION: GRS 46/11 16/7					
SS-15-12	Vital Records Program	SSTD	S			s
	Material relating to those records essential to continue			1		i
	an organization's function during and after an emergency				,	Į
a P	and records essential to protect the rights and interests					1
	of individuals and the government.			·		. .
	AUTHORIZATION: GRS 16/11 16/7					
SS-16	Reproduction/Printing	SSG	2yrs	1		l a
.5-10	Material relating to the reproduction of records by any	356	2113			1 "
•	medium (such as duplication, photocopying, and microfilming).			1		
	Includes procedures about and responses to reproduction		· ·	1 1	·	Į.
	requests.					1
				·		
	AUTHORIZATION: GRS 13/2 /7//			1		1
			·			
S-16-11	Copier Management Program	SSG	A+lyr			Α
	Material relating to convenience copiers, including		_			1
	analyses and rental information.					
	AUTHORIZATION: GRS 12/3(a) 13/2a					
	•					
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A - ACTIVE

See Section 8008 for explanation of KEY terms

P PERMANENT

S - SUPERSEDED/OBSOLETE

x - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

Z - ORIGINATING OFFICE

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D 04-15-88
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AFILE GUIDE AND RETENTION SCHEDULE

FILE CODE RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION SS-16-12 JCP Reports Reports to Congress through the Joint Committee on Printing (JCP) and related records. AUTHORIZATION: GRS-13/6- 3/ SSTD Reports Management Material relating to the supporting, initiation and approval of recurring internal or public use reports. Includes documentation of required reviews and evaluation, reports of committee actions, and related procedures for effective reports management. AUTHORIZATION: GRS 16/9- 16/ SS-18 Security Material relating to the direction and coordination of security plans, programs, and procedures that are required for the protection of BPA's office space, facilities, materials, and equipment and for BPA employees and visitors.	
SS-16-12 JCP Reports Reports to Congress through the Joint Committee on Printing (JCP) and related records. AUTHORIZATION: GRS-1376 3/ SS-17 Reports Management Material relating to the supporting, initiation and approval of recurring internal or public use reports. Includes documentation of required reviews and evaluation, reports of committee actions, and related procedures for effective reports management. AUTHORIZATION: GRS 16/9 6/9 SS-18 Security Material relating to the direction and coordination of security plans, programs, and procedures that are required for the protection of BPA's office space, facilities, materials, and equipment and for BPA employees and visitors.	
Reports to Congress through the Joint Committee on Printing (JCP) and related records. AUTHORIZATION: GRS 13/6 3/7 SS-17 Reports Management Material relating to the supporting, initiation and approval of recurring internal or public use reports. Includes documentation of required reviews and evaluation, reports of committee actions, and related procedures for effective reports management. AUTHORIZATION: GRS 36/9- 6/9 SS-18 Security Material relating to the direction and coordination of security plans, programs, and procedures that are required for the protection of BPA's office space, facilities, materials, and equipment and for BPA employees and visitors.	FRC OFFICE
Reports to Congress through the Joint Committee on Printing (JCP) and related records. AUTHORIZATION: GRS 43/6 3/ SSS-17 Reports Management Material relating to the supporting, initiation and approval of recurring internal or public use reports. Includes documentation of required reviews and evaluation, reports of committee actions, and related procedures for effective reports management. AUTHORIZATION: GRS 36/8- 6/ SSSS-18 Security Material relating to the direction and coordination of security plans, programs, and procedures that are required for the protection of BPA's office space, facilities, materials, and equipment and for BPA employees and visitors.	A
Reports Management Material relating to the supporting, initiation and approval of recurring internal or public use reports. Includes documentation of required reviews and evaluation, reports of committee actions, and related procedures for effective reports management. AUTHORIZATION: GRS 16/8- 16/9 S-18 Security Material relating to the direction and coordination of security plans, programs, and procedures that are required for the protection of BPA's office space, facilities, materials, and equipment and for BPA employees and visitors.	A
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materials, and equipment and for BPA employees and visitors.	
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AUTHORIZATION: Recommendation of Management	NI.
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S-18-11 Physical Security SSS	
Material relating to the protection of buildings.	
substations, vehicles, equipment, and materials.	
	1 1

K A - ACTIVE

P · PERMANENT

S - SUPERSEDED/OBSOLETE

 \mathbf{x} - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U, W)

Z - ORIGINATING OFFICE

See Section 800 8 for explanation of KEY terms

BPA RECORDS MANUAL

0 SUPPORT SERVICES

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APILE GUIDE AND RETENTION SCHEDULE

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SS-18-11	(a) Security and Protective Services Administration.	SSS	2yrs			
cont.)	Material relating to administration and operation of the		_	1		Ĭ
	facilities security protective services programs and	1		, ,	; g ;	1
7	related contracting.)			'	
	AUTHORIZATION: GRS 10/9 (8/8		•	ļ		,
· [1		i
	(b) Survey and Inspection Files	SSS	See Dispos	ition		•
李二哥	Reports of physical security surveys and other Department			ļ]
, d.	of Energy (DOE) inspections of BPA facilities which are					
	conducted to ensure adequacy of protective and preventive					
· · · · · · · · · · · · · · · · · · ·	measures utilized to prevent or reduce occurrences of					ł
	unauthorized entry, theft, vandalism, sabotage, and to					1
l.	safeguard information of a classified or sensitive nature.					
					1 .	
	<u>Disposition</u> : Destroy when 3 years old, or upon	-				
● .	discontinuance of facility, whichever is sooner.			ľ		ł
,	AUTHORIZATION: GRS 18/10 /8/9					
	AUTHORIZATION: GRS 18/10 / V/			1		
İ	(a) mad 11 (d. 1 a d. 1					
ļ	(c) Pacilities data sheets, including card key summaries,	SSS	lyr			
	check sheets, and Security Officer Reports (SORs).	i i				↓
	AUTHORIZATION: GRS 18/19(a) /6/184					
	AUTHORIZATION: GRS 18719181 1 57 5				 	
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APILE GUIDE AND RETENTION SCHEDULE

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•			OFFICE	BPA	FRC	OFFICE
S-18-11	(d) Central quard office master logs and Visitor Control	SSS	A+2yrs		<u> </u>	
cent.)	Files. Registers, logs, and computer reports showing names of contractors, service personnel, visitors, and employees admitted to areas. Also, reports on vehicles and passengers. AUTHORISATION: GRS 18/18(b)	LDN			ţ	
S-18-12	Personnel Security Clearances Material relating to employee background information, criminal records, drug and alcohol abuse, misrepresentation or falsification of facts, and infractions of security regulations. Personnel security clearance case files and related indexes. Case files documenting the process of	sss	See Dispos	ition		
	investigations on BPA employees, applicants for BPA employment, and other persons (such as those performing work for BPA under contract) for whom approval is required for access to Government facilities and/or to sensitive data, whether or not a security clearance is granted. These files include questionnaires, summaries of reports prepared by the investigating agency, and other records reflecting the processing of the investigation and the status of the clearance.					
	<u>Disposition</u> : Destroy 10 years following termination or clearance of access authorization, discontinuance, or cancellation, provided that all copies of personnel		,	21		
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	·		OFFICE	BPA	FRC	OFFICE	
S-18-12	security questionnaires are removed from the files and			 		<u> </u>	
(cont.)	sent to this address: Director of Medical and Health						
	Services Division, Oak Ridge Associates Universities					1	
	(Receiving), 230 Warehouse Road, Oak Ridge, TN 37830.		<u> </u>	10000	•	1	
F			u u			1	
.;	AUTHORIZATION: GRS 18/23(a) /8/22a						
est.							
SS-18-13	Computer Security	SWR	3yrs			S	
	Material relating to the physical protection of computer		•			1	
	centers and computer hardware and software. See also						
•	IR-14, Automated Systems Security.	-					
	AUTHORIZATION: GRS 10/10 /8/9						
-	AUTHORIZATION: GRS 19/10 (0)						
SS-18-14	Classified Documents	SSS	See Dispos	ition		ŀ	
35-16-14	Protection of documents that are considered vital to	355	Dee Diapon				
	National security or sensitive to BPA operations.					i	
	Includes forms accompanying documents to ensure continuing						
•	control, showing names of persons handling the documents,						
	intra-office routing and comparable data.		_	<u> </u>			
	,						
	Disposition: Destroy when related document is downgraded,						
	transferred, or destroyed.					1	
	18/56						
	AUTHORIZATION: GRS 18/6(B) (8/55			1 11 2	1		
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S - SUPERSEDED/OBSOLETE

* FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

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 $\mathcal{L}_{\mathsf{MSC}}$ from toon 800 B for explanation of REY terms.

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AFILE GUIDE AND RETENTION SCHEDULE

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THE GODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA		iN
			OFFICE	BPA	FAC	OFFICE
S-18-15	Vandalism, Theft, and Other Incidents	SSS	-2yro-		<u> </u>	
	Material relating to incidents such as vandalism and theft involving BPA buildings, equipment, materials, and employees. Case file records accumulating from investigations of theft and vandalism as well as incidents of fires, explosions, and accidents, consisting of retained copies of reports and related papers when the original reports are submitted for review and filing in other agencies or organizational elements, and reports and related papers concerning occurrences of such a minor nature that they are settled locally without referral to other organizations. See also PE-53-17, Safety Management. AUTHORIZATION: GRS Ta/12-					
SS-18-16	Intelligence Collection of information bearing on physical and personnel security awareness programs, security of facilities and personnel, and National Security information required in the conduct of BPA's operations. Authorization for retention is by direction from DOE. AUTHORIZATION: Recommendation of Management	SSS	3yrs	PENDI	NG	

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S - SUPERSEDED/OBSOLETE

See Section 600 B for exploration of KEY terms.

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SUPPLY SERVICES

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APILE GUIDE AND RETENTION SCHEDULE

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		RECORD	iN	STORAGE		. IN	
			OFFICE	BPA	FAC	OFFICE	
<i>z</i> e-	SUPPLY SERVICES Material relating to procurement, materials management, and quality assurance. Includes material relating to procurement contracts, purchase orders, and such issues as their negotiation, award, provisions, and termination. Data may be recorded on various media including paper, film, tape, disk, or diskette, unless otherwise specified in the narrative		See Dispos	ition		,	
	disposition.				i		
(14) · 秦 (7) · 4	<u>Disposition</u> : In accordance with instructions for specific material described by the following related subjects.			1789年119	東西鎮海		
	AUTHORIZATION: Recommendation of Management All retentions in this series that are by "Recommendation of Management" are justified as follows: Por historical/legal documentation of equipment purchases, to document quality inspections of equipment, or to document tests completed by the manufacturers of equipment.						
-11	Unique Procurement Files	SR	A+3vrg		D		
	Procurement files documenting the initiation and development of transactions that are highly unusual, highly significant, or that deviate substantially from established precedents to general agency procedures or major procurement		WI	HBRAWN 1 1	,	,	
	programs. Maintained by and for BPA's Contracting Officers.						
	Approximately 15 linear feet of records retained numerically			 			
	t .						
A - ACTIVE	* FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)	1		L	1.5124	J .	

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FILE GUIDE AND RETENTION SCHEDULE

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		1	OFFICE	BPA	FRC	OFFICE
SU-11	by contract number by fiscal year with an annual accumulation				ļ · · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·
(cont.)	of 6 linear feet. Offer to NARA in annual segments after					
	25 years.		ji	66 4 4 4 A		
•		+			}	1
	AUTHORIZATION: OPE /9/2	J			†	
SU-12	Routine Procurements	DSDG	A+lyr	5yrs		A+lyr
	Contracting documents with original signatures. See also					1
	PI-17, Vouchers.			L		J
			1	IEAIRE	ir	}
	AUTHORIZATION: PERC-18CPR-125.3/7(a)&(b)		T	LNUM	lb	
			•			
SU-12-11	Solicitations	SR				
	Solicitation files maintained in the Division of Materials	MK		J	,	1
	and Procurement and the Division of Construction			1 经费制产品		i
	consisting of drafts, addendums, mailing lists, bidders'				1	
	data, abstracts, and related correspondence.			ļ		
	(a) Successful Rid and Proposal Files	SP	0 0!	1		[
	TAI THE LEGITAL BLU SHU PLOPOSAL SILOS	MK	withda	BIEION		1
	Disposition: Destroy 6 years and 3 months after final	1 m	withdr	teun	1	
	payment or at expiration of warranty and latent defects	1 1				
	period. Transfer fiscal year block to Pederal Records					
	Center after 2 years.	 	-	· ·		
	a(1)					}
<u></u>	AUTHORIZATION: CRS 3/P 3/7	<u> </u>	·			

	(h) Unsuccessful Bids and Proposals, including late	SR	See Dispo	sition		
	proposals and modifications that are not considered.	MK.			,	
			WITHDRAWN	1		

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A - FIRST LETTER IN AREA OFFICE ROUTING (L. T. U. W)

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CHAPTER **BPA** 810 RECORDS MANUAL

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			OFFICE	BPA	FRC	OFFICE
	Disposition: Destroy 90 days after award to the successful	+		 		<u> </u>
cont.)	bidder. In the event of a protest, the 90-day period will		Wi	BRAWN		1
	begin after resolution of the protest or contract award,] ; f	İ
	whichever is later. All other copies of materials submitted by unsuccessful bidders shall be destroyed			nruni	MU	
**	following award.			PPRIII	Mi	
	toriowing award.			PILIDI	710	
	AUTHORIZATION: Recommendation of Management					
			· · · · · · · · · · · · · · · · · · ·		i¢ :	
	(c) Crant Application Pilos. Applications, memoranda,	SR	See Dispos	tion		
	correspondence and other records relating to the decision	MK	·u	Hadraun	j	I
	to accept or reject grant applications.			40,000		
,	Disposition: Accepted applications - Destroy 6 years and 3			1	j	1
	months after final payment or at expiration of Warranty		•		b	
	and latent defects period. Transfer fiscal year block					
	to Pederal Records Center after 2 years.					1
	AUTHORIZATION: CRS 3/3					+
		†		 		
	Disposition: Rejected applications - Destroy 90 days after		W	Acrawn	<u> </u>	
	award to the successful bidder. In the event of a protest,				1	I
ļ	the 90-day period will begin after resolution of the protest					
	or contract award, whichever is later. All other copies of					
	materials submitted by unsuccessful bidders shall be					1
l	destroyed following award.			DCAVI	NC	
				FERUI	IVU.	
	AUTHORIZATION: Recommendation of Management	+				-
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			OFFICE	BPA	FAC	OFFICE	
<u>U-12-11</u>	(d) Unsolicited Proposals	SR	See Dispos	,	 		
cont.)		MK	with	raun		1	
	Disposition: Rejected Proposals - 6 months following					1	
• ·	disposition of proposal. Accepted Proposals become	_	1		up -	I	
	part of the award file and are retained there.			LITUI			
	AUTHORIZATION: Recommendation of Management						
	NOTHORIENTEON: RECOMMENDATION OF WORKS, CO.						
U-12-12	Avards	2	See Diapos	tion		A+lyr	
	Requisition, Contract, Purchase Orders, lease, bond and				. A	•	
	surety records, including correspondence and related						
	papers pertaining to award, administration, receipt,					Į.	
	inspection, acceptance, termination, and payment.						
•	Maintained by and for the Contracting Officer. Office						
,	of Record is usually SR.					1	
	(a) Makandala amanlian amudamant (a) was then the	SR	See Dispos	tion			
	(a) Materials, supplies, equipment (other than that identified under SU-11 above), and service contrasts	SK	see Dispos	1011			
	over \$25,000.					1	
		-	,	i			
	Disposition: 6 years and 3 months after final payment					1	
	or until expiration of warranty and latent defects				1.		
	period. Transfer fiscal year block to Pederal Records					1	
	Center after 2 years.					\bot	
	2/2.1		,		}		
	AUTHORIZATION: GRS 3/4(=)(1) 3/34				 		
						j	

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Z - ORIGINATING OFFICE

BPA RECORDS MANUAL

SUPPLY SERVICES

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FILE GUIDE AND RETENTION SCHEDULE

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FILE CODE RECORDS SE	RIES TITLE, DESCRIPTION, AND DISPOSITION	OF	OFFIC	E OF RECOP		OTHER COPIES
		RECORD	OFFICE	ВРА	FRC	OFFICE
(cont.) of \$25,000 or less	plies, equipment, and service contracts acquired using Small Purchase procedures 13 of the Bonneville Acquisition Guide.	SR SSL	See Dispos	ition		S
at the end of the f	rs after final payment. Close file . iscal year, retain 3 years and destroy n which actions are pending shall be		е .			
	the next fiscal year's files for					
AUTHORIZATION: GRS	WATER1424 3/342			14 350	ane!	
SU-12-13 Construction Contra		MK	*	<i>I</i> 1	6yrs	
bidders' data, bids performance and pay papers pertaining t	tation, addendums, mailing lists; , bid bonds, abstracts, contract, ment bonds, correspondence and related o award, administration, acceptance		wi ·	therown	un.	
and payment. AUTHORIZATION: PER	C-18CPR-125-3/40(a)(1)			ENU	16	
SU-12-14 Grants and Cooperat	ive Agreements	SR	See Dispos	ition		<u> </u>
Proposals or applic project reports, st memoranda, correspo	ations, financial assistance award, udies, certificates, agreements, ndence, and other records relating award, evaluation, status and		W	therawn	i e	
monitoring of grant	s and cooperative agreements, , and project budgets.					

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See Section 80000 to explanation of REV terms.

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APILE GUIDE AND RETENTION SCHEDULE

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U=12=14	Disposition: 6 years and 3 months after final payment					
cont.)	or until expiration of warranty and latent defects period. Transfer fiscal year block to Pederal Records Senter after 2 years. AUTHORIZATION: GRS 3/4(a)(1) 3/3a			t i gra	64), 2	
J-12-15	Inter/Intragovernmental Agreements	SR	See Dispe	osition		
,	Requisition, agreement, and related documents about the award, administration, termination, and payment for services such as engineering, economic, and research and development studies obtained from government entities. Maintained by and for the Contracting Officer.		· ·	i i i i i i i i i i i i i i i i i i i		
	Disposition: 3 years after final payment. Close file at the end of the fiscal year, retain 3 years and destroy except that files on which actions are pending shall be brought forward to the next fiscal year's files for destruction therewith. AUTHORIZATION: GRS 3/4(a)(2)					
J -13	Socio-Economic Programs Material relating to small, minority, and woman-owned businesses.	SR	A+2yrs	4yrs		
	AUTHORIZATION: Recommendation of Management			PENDI	VG	

A - ACTIVE

P - PERMANENT

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 \mathbf{x} - FIRST LETTER IN AREA OFFICE ROUTING (L., T, U, W)

Z - ORIGINATING OFFICE

See Section BIDB for explanation of KEY terms

BPA 810 RECORDS MANUAL

1SUPPLY SERVICES

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APILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORAGE		IN		
			OFFICE	BPA	FRC	OFFICE		
_ A	Materials Management Material relating to inventory management, material storage and disposal, tools and work equipment, BPA Standards Catalog, and property management policies. See also PI-13, Property Control.	SR MM	A+lyr	PENDI	NG	A		
٠,	<u>AUTHORIZATION</u> : Recommendation of Management				,	·		
-14-11	Inventory Management	SRM						
- 73	Material relating to BPA stock and non-stock items, as well as System Equipment Records (SER). Includes all items in the BPA Standards Catalog, management of substation, transmission, and general stock item material inventories, and material and equipment loans to non-BPA organizations. See also SU-14-12, BPA Standards Catalog, and SU-14-17, Maintenance Catalogs.	MM xD	(L);thdrawn				
	(a) System equipment records	SRM MM xD	S			s		
·	(b) Material requests	SRM	A+lyr					
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See Section 800 8 for explanation of KEY terries

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AFILE GUIDE AND RETENTION SCHEDULE

	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE	RETENTION PERIOD					
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN OFFICE	STOR/ BPA	VGE FRC	IN OFFICE		
U-14-11	(c) Equipment loans	SRM	λ			A .		
cont.)	(c) Equapment source	MM			_			
•		ХD		DENN	NG			
				LLIAN	NU			
	AUTHORIZATION: Recommendation of Management							
SU-14-12	BPA Standards Catalog	SRM	A+5yrs					
	Material relating to the maintenance of the BPA Standards		٠			·		
	Catalog, including stock and non-stock items, Stock/Catalog			1	1			
	Recommendations, and the Material Identification System.			DENNI	NC			
• •	AUTHORIZATION: Recommendation of Management			ILITUI	10			
U-14-13	Tools and Work Equipment	SRM				1		
	Materials relating to stock and special tools and work					1		
ļ	equipment. Includes requests, tools and work equipment					1		
	custodian inventories, and the Ross Stock Catalog.							
	(a) Tools and Work Equipment Requests	SRM	A+5yrs			λ		
	(b) Tools and Work Equipment Custodian Inventories	SRM	A+3yrs					
	(b) 10018 and work Equipment Caseosian intenseries					·		
	(c) Ross Stock Catalog	SRM	S			s		
	AUTHORIZATION: Recommendation of Management			PÎD				
	NOTION INCOMMENDATION OF THE STATE OF			NINATA	AL.			
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CHAPTER **BPA** 810 RECORDS MANUAL

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	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE	RETENTION PERIOD				
FILE CODE		OF RECORD	OFFI	CE OF RECOR		OTHER COPIES	
PILE CODE			IN	STORA		IN	
			OFFICE	BPA	FAC	OFFICE	
4-14	Material Storage	SRM	A+3yrs				
	Materials relating to the storage and warehousing of					Į.	
	items at the Ross warehouse, Washougal Material Yard,			THE THEFT			
	and outlying storage facilities under the management of		,	PAIDI	10	1	
••	the Supply Operations Section 7SRMA).			h-viii			
	Allmuont damion. December 1-1 top of Management			LITUII	TU	·	
•	AUTHORIZATION: Recommendation of Management			1			
J-14-15	Material Disposal	SRM	See Dispo	stion		<u> </u>	
	Materials relating to the disposal of all excess material			ł		1	
	and equipment at BPA. Includes property disposed of					1	
:	through DOE, GSA sale, term contract, and donation. See			ļ		1	
	also FI-13, Property Control.		0	هنام		1	
	\$25,000		240 400	The t		1 .	
	(a) Transactions of more than \$10,000	\perp 1	A+Zyre	M	4yrs	, A	
	#25,000		34	rs ofte		1,	
	(b) Transactions of \$10,000 or less		HISTER	downst		A	
	AUTHORIZATION: RPA Records Schedule and Piles Handburk PM-90		/			 	
	AVIDUALIZATION: APA RELATION SCHEMULE AND FILES BANDAUG FEEST						
J-14-16	Personal Property Policy	SRM	A+lyr			٨	
	Material relating to BPA personal property policy on						
	expendable materials and supplies and issuance of the BPA		,	i		1	
,	Personal Property Policy Manual. See also PI-13-17,			ł			
1	Personal Property Accounting System Procedures, and MN-14,			ATME	110	1	
	Manuals/Handbooks.		•	PEND	NI.		
	AUTHORIZATION: Recommendation of Management			LITUI	MU		
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		OFFICE			N PERIOD		
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA		- IN	
•			OFFICE	BPA	FAC	OFFICE	
■	Maintenance Catalogs Catalogs and related data prepared and maintained by System Maintenance for stock and nonstock parts, equipment, and materials used in maintaining the power transmission system. See also SU-14-11, Inventory Management, and SU-16-13, Maintenance and Repair.	ММ	A+5yrs			A	
	(a) Substation Maintenance Parts (SMP) Catalog						
	(b) System Protection Maintenance (SPM) Catalog			DEMO	110	,	
•	(c) Power System Control (PSC) Catalog			PEND	NG		
	AUTHORIZATION: Recommendation of Management						
V-15	Quality Assurance Material relating to BPA's Quality Assurance Program	SRQ	s			S	
	AUTHORIZATION: Recommendation of Management			PENDI	16		
5-11	Bidders' Information File Centralized file of vendor history used to support factory surveillance and contract administration. Case file by	SRQ	S				
	vendor name. AUTHORIZATION: Recommendation of Management			PENDI	NG		

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APILE GUIDE AND RETENTION SCHEDULE

FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE OF RECORD	RETENTION PERIOD			
				CE OF RECOF		OTHER COPIES
			IN	STORAGE		IN
			OFFICE	BPA	FRC	OFFICE
50-15-12	BPA Specifications	SRQ	S.			A
	Master copies of BPA material specifications. Case file					
	by BPA specification number.			ULTIPI	NO.	l
				PENDI	NK	
	AUTHORIZATION: Recommendation of Management	1		ITIM	עוו	
SU-15-13	Factory Surveillance Activities	SRQ	3yrs	1	-	A
	Material relating to activities involved in factory					l
	inspection and tests.					}
				ULMIII		Ì
	AUTHORIZATION: Recommendation of Management			T LITUII	NU	
					4	
SU-15-14	Inspection and Test Plans	SRQ	S		1	
	Centralized file of approved vendor inspection and test				ļ	1
	plans. Case file by vendor name and contract number.			arini	NO	1
				LL MIII	Ne	
	AUTHORIZATION: Recommendation of Management			PIIDI	עוו	
			••		ľ	
SU-15-15	Programs for Supply Contracts	SRQ	2yrs			
	Quality program requirements for supply contracts.					
				UENNI	אוף	1
	AUTHORIZATION: Recommendation of Management			PENDI	Y	
:U-15-16	Programs for Service Contracts	SRQ	2yrs		1.	
	Quality program requirements for service contracts.				1	1
				A	40	
	<u>AUTHORIZATION</u> : Recommendation of Management			nrviii		
				ILITUI	ITU	

See Section 8008 for explanation of KL7 terms

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AFILE GUIDE AND RETENTION SCHEDULE

		OFFICE	RETENTION PERIOD				
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	M	STOR		iN	
			OFFICE	BPA	FRC	OFFICE	
SU-15-17	Quality Assurance Program Manuals	SRQ	S				
	Centralized file of vendor quality assurance program					ł	
`	manuals. Case file by vendor name.			OFMOR	10		
	manually case the sy vonder name			PENDI			
	AUTHORIZATION: Recommendation of Management			FILIDI	ŅU		
	AUTRORIZATION: Recommendation of Hanagement				,		
SU-15-18	Qualified Bidders' <u>List</u>	SRQ	S				
	Material relating to qualification of vendors and		_				
	supporting data. Master copy of QBL Program. Case						
				ULNDI	NO.		
	file by vendor name.			PENDI	Nu		
,				IFIIDI	ITU	1	
	AUTHORIZATION: Recommendation of Management					1	
		SRQ	2yrs			s	
SU-15-19	Quality Control	SAU	ZYLS		ĺ	1 "	
	Material relating to quality control activities.			ULTINI	MA		
				PENDI	N		
	<u>AUTHORIZATION</u> : Recommendation of Management			i Filh	10	l	
,		ano.					
SU-15-20	Quality Costs	SRQ	S			,	
	Material relating to quality costs data/analysis.						
				OCNIN			
	AUTHORIZATION: Recommendation of Management			PENDI	טו	· [
		670					
SU-15-21	Qualified Products Lists	SRQ	S			. [
	Material relating to qualifications of vendors and						
	supporting data.			-			
				PENDIN			
	AUTHORIZATION: Recommendation of Management			TLITUII	IÜ		
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AFILE GUIDE AND RETENTION SCHEDULE

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FILE CODE		RECORD	IN. OFFICE	STOR/	VGE FAC	OFFICE	
		SRQ	S			A	
	Quality Problem Notices	ΣΚΩ	. ·			1 ^	
	Records of quality problem notices (QPNs) issued and			ATMIN	110		
	statements of corrective actions by contractors.			PENDI	M.	1	
ľ	NIMUONTANTON December Johlen of Management	ľ		I Film	110	•	
	AUTHORIZATION: Recommendation of Management						
U-15-23	Reliability/Availability/Maintainability Requirement	SRO	2yrs				
	Material relating to reliability/availability/		_				
	maintainability (RAM) requirement and related activities.			ULTIVI	MD .	1	
		_		PENDI	VI)		
	AUTHORIZATION: Recommendation of Management			1 Pilon		,	
						l '	
J-15-24	Receiving Inspection Activities	SRQ	3yrs	į			
	Material relating to the inspection of materials						
	received by BPA.			-		I	
				PENDI			
	AUTHORIZATION: Recommendation of Management		•	TLITUI	IU	i	
U-15-25	Reliability Improvement Warranties	SRQ	3yrs				
	Material relating to activities of BPA's Reliability						
	Improvement Warranties (RIW) Program.			CHIDI			
				PENDI	Mi		
	<u>AUTHORIZATION</u> : Recommendation of Management		•	ILITUII	IU		
		020		ļ	ŀ] .	
J -15-26	Sampling Plans	SRQ	S		1		
	Material relating to sampling plans and their application.						
	AUMUODICAMION. Docompondation of Management			DEMINI	NO.		
	<u>AUTHORIZATION</u> : Recommendation of Management			LEMINI	Y In		
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SUPPLY SERVICES

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FILE GUIDE AND RETENTION SCHEDULE

·		OFFICE -		RETENTION	PERIOD		
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OFFICE	OFF	FICE OF RECORD		OTHER COPIES	
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN OFFICE	STORAGE BPA	FAC	IN OFFICE	
SU-15-27	Statistical Process Control	SRQ	Зугв	nevenie en men en nemerous audition abas an			
·	Material relating to statistical process control (SPC) and its application.	,		PENDIN	C		
	<u>AUTHORIZATION</u> : Recommendation of Management						
U-15-28	Test Reports Material relating to testing done by manufacturers on	SRQ	15yrs		35yrs		
	equipment purchased by BPA. Case file by vendor name and contract number.			DENDIN	C		
	<u>AUTHORIZATION</u> : Recommendation of Management			FIAMI	U		
U-16	Supplies and Equipment	SSK	2yrs			lyr	
	Material relating to requests for supplies and equipment. See also PI-13, Property Control, and SU-12, Routine Procurements. AUTHORIZATION: GRS 3/5 3/6						
U-16-11	Personal Property Requisitions Material relating to inventories of office equipment, including numbered office equipment.	SSTE	S+lyr			s	
	AUTHORIZATION: BPA Records Schedule and Files Handbook PM-3						
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BPA RECORDS MANUAL

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FILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN	STORA	GE	IN	
		TECOND	OFFICE	BPA	FRC	OFFICE	
su-16-13	Receiving Reports	GRQB	3yrs			 	
1	Original copy of Form BPA 29 and material relating to the receipt of equipment.	SRMC					
:	AUTHORIZATION: BPA Records Schedule and Files Handbook PC-3/	(8) (a)					
SU-16-13	Maintenance and Repair Material relating to the maintenance and repair of BPA-owned or leased office and substation equipment See also SU-14-11, Inventory Management, and SU-14-17, Maintenance	SSTE MM xD	A+lyr			A	
·	Catalogs. <u>AUTHORIZATION</u> : Recommendation of Management			PENDI	16		
SU-17	Materials Management System Material relating to the implementation of the automated materials management system.	SWSI	3yrs		5yrs	2yrs	
	<u>AUTHORIZATION</u> : Recommendation of Management	·		PENDI	NG		
SU-17-11	Current System Material relating to the analysis of the manual materials management system.	SWSI	3yr s		5yrs	2yrs	
	<u>AUTHORIZATION</u> : Recommendation of Management			PENDI	NG		
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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISTOSTION	RECORD	IN	STORAGE		IN OFFICE
)		OFFICE	. BPA	FRC	OFFICE
-17-12	Scheduling	SWSI	3yrs		5yrs	2yrs
	Material relating to the conversion from the manual to				ļ	
	the automated materials management system.			ALMUI	NO	
		1		PENDI	NE	ľ
	<u>AUTHORIZATION</u> : Recommendation of Management			PIIDI	110	
J-17-13	Cost-Benefit Analysis	SWSI	3yrs		5yrs	2yrs
.	Material relating to the cost-benefit analysis prepared		- .		-	
	for the proposed automated system.			AFMON	din.	
	• •			hfuill		
·	AUTHORIZATION: Recommendation of Management			1 FIINI	IV	ŀ
			_			
J-17-14	MMS History	SWSI	3yrs		5yrs	2yrs
	Material detailing how the automated system evolved.					
	AUTHORIZATION: Recommendation of Management					
			•	PENDI	ur -	
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TRAVEL AND TRANSPORTATION

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FILE GUIDE AND RETENTION SCHEDULE

		OFFICE -		RETENTIO			
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF	OFFIC	CE OF RECORD		OTHER COPIES	
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			OFFICE	6PA	FRC	OFFICE	
	TRAVEL AND TRANSPORTATION		See Disp	osition		A+lyr	
	Material relating to the movement of goods and persons under						
	Pederal Property Management Regulations and reimbursement of			1			
•,	employees for travel expenses under the Pederal Travel					l	
	Regulations. Includes transportation requests, travel				,	i	
	authorizations, payment to employees, bills of lading,						
* →	use of aircraft and motor vehicles, and fuel used for such	ĺ					
	transportation. Data may be recorded on various media						
	including paper, film, tape, disk, or diskette, unless			1			
	otherwise specified in the narrative disposition.	1 1				1	
	Disposition: In accordance with instructions for specific	·					
-	material described by the following related subjects.	1 1				1	
						,	
P-11	Bmployee Travel	DSDT	_ _	2yrs	Ayrs	lyr	
	Material relating to reimbursing individuals for official						
	travel. Includes travel authorizations, travel vouchers,					1	
	and transportation requests. A microfilm copy of these				į	1	
	records is maintained in the Office of Record for its					·	
	convenience on an as-needed basis not to exceed the official						
	retention period of seven years.						
	AUTHORIZATION: BPA Records Schedule & Files Handbook						
	FM-1(j),21,627						
. 12	Munnemoutetten Descourage and Durit		200		{ ,	ľ	
-12	TransportationPassengers and Preight	Z	3yrs		Ĺ		
	Material relating to freight consisting of export					L .	
	certificates, transit certificates, demurrage card record						
	books, shipping documents pertinent to freight						
	L	J L		<u> </u>	<u> </u>	4	

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FILE GUIDE AND RETENTION SCHEDULE

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FILE CODE			iN	STORA		IN SEEMS
<u> </u>			OFFICE	BPA	FRC	OFFICE
TT-12	classification, memorandum copies of Covernment or commercial	-		 		-
(cont.)	bills of lading, shortage and demurrage reports, and supporting					
	documents. Also includes Government Transportation Requests	l				
, .	(CTRs) for common carrier transportation services. Office of					
,	Record is usually DSDT or SRQB.					·
		1 . 1		1		
	AUTHORIZATION: GRE GRS 9/16					
			_			
TT-12-11	Preight Bills	Z	3yrs '			
	Bills of Lading for common carrier transportation,			-		
	shipment of household goods, and transportation of goods.					1
	NOTE: Office of Record is usually DSDT or SRQB.					1
,		↓ I				
	AUTHORIZATION: GRS 9/16					
		CD HC	2			
TT-12-12	Passenger Bills	SRMC	3yrs			1
,	Material relating to payment of Government Transportation					
	Requests (GTRs).	ł				1
1	AUTHORIZATION: GRS-9/1					
у ТТ-12-13	BPA Rail Cars, Carrier Files, Hazardous Material	SROB	s			
TT-12-13	All material relating to the four BPA-owned rail cars	J. U.	•			
	including drawings, file of commercial carriers in					
	alphabetical order, and regulations pertaining to			1		
	shipments of hazardous material. See also EQ-18,			MEALDI		
	Hazardous Waste Management Program.			PENI		
	Hazardous muste namayement rrograms			741101		
	AUTHORIZATION: Recommendation of Management					
	Transfer and Transmission of Hall 2					J

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TRAVEL AND TRANSPORTATION

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FILE GUIDE AND RETENTION SCHEDULE

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		OFFICE	OFF	ICE OF RECORD		OTHER COPIES	
FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	OF RECORD	IN	STORAGE		- IN	
	,		OFFICE	BPA	FRC	OFFICE	
T 2-14	BPA Substation and Storage Yard Shipping Destinations	SRQB	S			ŀ	
	Shipping destinations for all BPA substations and storage						
	yards in alphabetical order.		ļ	GEND!	lib .		
				ST RU			
	<u>AUTHORIZATION</u> : Recommendation of Management			4			
TT-12-15	Customs==Import/Export	SROB	3vrs				
	Records of all import and export shipments made on behalf	-	-		1	1	
	of BPA; special U.S. Customs forms required for import and						
	export.						
		`				1	
	AUTHORIZATION: GRS 9/1(c)						
						1	
TT-12-16	Freight Rates	SRQB	3yrs ·				
.	Material relating to freight rates from commercial carriers					Í	
	for studies and movement of BPA equipment and materials.						
	NUMBER OF THE PROPERTY OF THE		•			i	
	AUTHORIZATION: GRS 9/1(c)	+	,			İ	
TT-12-17	Rail, Truck, Ship Reports and Tracing Sheets	SRQB	374E				
11 12-17	Material relating to shipment of BPA materials and	Sings	37.5	\downarrow			
-	equipment from the contractor's plant to BPA by rail,						
	truck, and ship.						
	AUTHORIZATION: GRS 9/1(c)				ļ	 	
ļ						1	
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FILE GUIDE AND RETENTION SCHEDULE

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FILE CODE	RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION	RECORD	IN	STORA	GE	IN	
			OFFICE	ВРА	FRC	OFFICE	
T-13	Land and Sea Vehicles	_ HMNB	-2yre-	 		 	
	Material relating to assigning, scheduling, dispatching, operating, and maintaining land and sea vehicles in the course of official government business. Includes heavy mobile equipment such as bucket trucks and cranes. Does not include material about vehicular accidents or about the purchase, sale, transfer, exchange, or disposal of vehicles. AUTHORIZATION: GRS 10/1						
T-13-11	Pleet Management Material relating to GSA fleet management (motorpools and vehicle assignments).	ммив	A+3yrs			A	
r-13-12	AUTHORIZATION: GRS 10/7 Assignment Records Material relating to assignment of BPA-owned vehicles.	ммив	A+3yrs			A	
	AUTHORIZATION: GRS 10/7						
r-13-13	Service Requests Material relating to the service and repair of government- owned vehicles.	MMND	lyr			A	
	AUTHORIZATION: CRS 10/2(b)	<u> </u>					
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RECORDS MANUAL TRAVEL AND TRANSPORTATION

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			OFFICE	8PA	PHU		
	Aircraft Material relating to assigning, scheduling, and dispatching fixed-wing and other aircraft in the course of official government business. Not included are records about accidents and the purchase, sale, transfer, exchange, or disposal of aircraft.	МС	3yrs	PENDI	NG	2yrs	
	AUTHORIZATION: Recommendation of Management						
TT-14-11	<u>Pixed Wing</u> Material relating to the usage of fixed wing aircraft including registrations and insurance.	МС	3yrs	DENNI	MG	2yrs	
	AUTHORIZATION: Recommendation of Management			4 FIAM	TU	1	
TT-14-12	Helicopter Material relating to the usage of helicopters including registrations, insurance, noise complaints.	MC	3yrs	PENDI	NG	2yrs	
	AUTHORIZATION: Recommendation of Management						
rT-14-13	Plight Logs Records of flight logs for all aircraft (fixed wing and helicopter). Establish case files by type of aircraft	MC	5yrs ·				
	and serial number. <u>AUTHORIZATION</u> : Recommendation of Management			PENDI	NG		

A - ACTIVE

S - SUPERSEDED/OBSOLETE

See Section 800 8 for explanation of KEY terms

P - PERMANENT

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CHAPTER P TT-6 **BPA** 810 TRAVEL AND TRANSPORTATION RECORDS D 04-15-88 MANUAL DOE/NARA FILE GUIDE AND RETENTION SCHEDULE **RETENTION PERIOD OFFICE** OTHER COPIES OFFICE OF RECORD OF RECORDS SERIES TITLE, DESCRIPTION, AND DISPOSITION **FILE CODE** STORAGE RECORD OFFICE OFFICE FRC MC TT-14-14 Aircraft Maintenance S (a) Material relating to maintenance and alteration of each aircraft and of each engine, propeller, rotor, and appliance of an aircraft. AUTHORIZATION: Pederal Aviation Regulation 91.173(b)(1)&(b)(3) (b) Materials relating to total time in service for each aircraft. AUTHORIZATION: Federal Aviation Regulation 91.173(b)(2) MMNB 2vrs TT-15 Material relating to the consumption of fuel for vehicles. AUTHORIZATION: BPA Records Schedule & Files Handbook EMP-21&22(a)

MMNB

MMNB

2yrs

2VIB

TT-15-12

TT-15-11

Puel Logs

Material relating to BPA's vehicle fuel logs.

Material relating to BPA's fuel utilisation.

AUTHOPIZATION: BPA Records Schedule & Files Handbook EMP-22(4

AUTHORIZATION: BPA Records Schedule & Files Handbook EMP-22(d)

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Fuel Utilization

See Section 800.8 for explanation of KLY terms

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810 **RECORDS** MANUAL

CHAPTER

TRAVEL AND TRANSPORTATION

04-15-88 DOE/NARA

FILE GUIDE AND RETENTION SCHEDULE

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T' 5-13		ļ	OFFICE	BPA	FRC	OFFICE
5-13	Fuel Inventory Report Monthly reports of fuel inventory in fuel tank.	MMNB	2yrs	<u> </u>		 ^
	Honchity reports of their inventory in fuel tank.]		
ļ	AUTHORIZATION: BPA Records Schedule & Files Handbook EMP-21					
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See Section 800.8 for explanation of KEY terms

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