

**REQUEST FOR RECORDS DISPOSITION AUTHORITY***(See Instructions on reverse)*TO: NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NIR)  
WASHINGTON, DC 20408

1. FROM (Agency or establishment)

Small Business Administration

2. MAJOR SUBDIVISION

Office of Administrative Services

3. MINOR SUBDIVISION

Administrative Information Branch

4. NAME OF PERSON WITH WHOM TO CONFER

Helga Taylor

5. TELEPHONE

(202) 205 - 7053

LEAVE BLANK (NARA use only)

JOB NUMBER

N1-309-05-21

DATE RECEIVED

6/6/05

**NOTIFICATION TO AGENCY**

In accordance with the provisions of 44 U.S.C. 3303a the disposition request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10.

DATE

8/7/06

ARCHIVIST OF THE UNITED STATES

John W. ...

**6. AGENCY CERTIFICATION**

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposition of its records and that the records proposed for disposal on the attached 3 page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified; and that written concurrence from the General Accounting Office, under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies,

☒ is not required; ☐ is attached; or ☐ has been requested.

DATE

03-18-2004

SIGNATURE OF AGENCY REPRESENTATIVE

*Regina White*

TITLE

*Acting*

Records Officer

7.  
ITEM  
NO.

8. DESCRIPTION OF ITEM AND PROPOSED DISPOSITION

9. GRS OR  
SUPERSEDED  
JOB CITATION10. ACTION  
TAKEN (NARA  
USE ONLY)

The attached electronic records disposition schedule for Partner Identification and Management System is a new electronic application to be added to SBA's present records management manual.

*SA 8/8/06 Copies sent to Agency, NR*

**System Name:** Partner Identification and Management System

**Program:** Office of Financial Assistance

**Legal Authority:**

**Applicability:** Agencywide

**Restrictions:** This system contains confidential commercial or financial information the disclosure of which might be restricted under the Freedom of Information Act (FOIA).

**Purpose:** The Partner Identification and Management System (PIMS) is designed to meet SBA's business need to identify and manage lending institutions and other organizations that partner with SBA to provide services to the small business community. In addition to collecting major information about Partners (names, addresses, contacts, participation agreements, history, etc.), PIMS also assigns Financial Institution Reporting System (FIRS) Numbers to lenders and feeds that information to FIRS on the SBA mainframe for use by the Loan Accounting System.

Item No.	Description of Records	Disposition
1.	Input.	
	a. Data from Thomson Financial Publishing in Chicago via replication.	a. No disposition. System to system interface.
	b. Data on SBA specific partners, contact information on all lenders, and 750 agreement dates on regulated lenders and SBA specific non-bank lenders keyed in by SBA staff. This is based on certifications of participation and licensing agreements.	b. Temporary. Approved as N1-309-86-1, Item 50:15.
	c. Selected data updated by partners, e.g., contacts, addresses.	c. No disposition. SBA has no data.
2.	Master File. The master file is a Sybase database and includes the following information: Name, Address, Phone/Fax Numbers, URL, E-Mail Address, Alias' (other names or numbers by which the Partner is identified; i.e., FDIC #, CDC #, Former Name, etc.); Participation Agreements with SBA including beginning date, ending date (if applicable) and areas of operation (states & counties); Contact Persons with their name, phone/fax, URL and/or e-mail address; Chron Notes on Field Visits, etc.	Temporary. Delete three years after termination of the system.
3.	Output. Update file to the Financial	Temporary. Delete after update

Institution Reporting System (FIRS).

has been completed.

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| 4. | Documentation.   | Temporary. Destroy or delete at each major version change.   |
| 5. | Backups.   | Temporary. Delete after the primary records have been deleted, or when replaced by a subsequent backup file. |
| 6. | Electronic Mail and Word Processing Copies:<br>Electronic copies of records created on electronic mail and word processing systems and used solely to generate a recordkeeping copy of other items covered in this schedule. | Temporary. Delete after the recordkeeping copy has been produced.  |

**Contact Information:**

Name: Stephen Kucharski

Telephone No: 202-205-7551

Program: Office of Financial Assistance