



Department of Energy

Bonneville Power Administration
P.O. Box 3621
Portland, Oregon 97208-3621

PUBLIC AFFAIRS

October 13, 2010

In reply refer to: DK-7

Richard van Dijk
Another Way BPA
Ex 6

RE: FOIA #BPA-2011-00046-F

Dear Mr. van Dijk:

This is a final response to your request for information that you made to the Bonneville Power Administration (BPA) under the Freedom of Information Act (FOIA), 5 U. S.C. 552. Your letter was received in this office on Tuesday, October 12, 2010, and has been assigned a control number, BPA-2011-00046-F.

We have reviewed your letter and have determined that it addresses all the criteria of a proper request under the FOIA and the DOE regulation that implements the FOIA at Title 10, Code of Federal Regulations, Part 1004. Your fee waiver has been granted.

You have requested the following:

Copies of Chapters ED, IR, MA, PC and Keyword Index in BPA Records Manual.

Response:

BPA has provided the responsive records in electronic version.

I appreciate the opportunity to assist you. Please contact Laura M. Atterbury, FOIA/Privacy Act Specialist at (503) 230-7305 with any questions about this letter.

Sincerely,

/s/ Christina J. Munro

Christina J. Munro
Freedom of Information Act/Privacy Act Officer

Enclosure(s): Responsive Documents

**Bonneville Power Administration
Records Manual Guide
04/19/2010**

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100 RECORDS & INFORMATION MANAGEMENT OVERVIEW

100.1 SCOPE

Records Management is the consistent and systematic control of information, including creation, maintenance (use, storage, retrieval) and archiving or disposal, regardless of media. Records Management helps us decide:

- What to keep
- What to destroy
- When to destroy

100.2 RESPONSIBILITIES

All employees and contractors are responsible for ensuring that records they create, receive or use in the performance of their daily activities are managed efficiently and in accordance with the BPA Records Manual. These duties include, but are not limited to, maintaining accurate files, ensuring access to records, disposing of records properly and turning all records over to BPA upon leaving the Agency.

Each organization's manager/supervisor is responsible for operating an effective records management program within his or her area of responsibility in accordance with the provisions in the BPA Records Manual.

The BPA Records Officer and staff are responsible for coordinating the overall records management program, for providing related technical advice and assistance to all BPA organizations, for supervising disposal of records and for coordinating required records reviews, evaluations and reports.

Note: Information received, created or compiled by the officials and employees of the Federal Government for the use of the Government is record material and is, therefore, the property of the United States. Federal officials and employees, by virtue of their positions, have no personal or property right to records even though they may have helped develop or compile them. The unlawful destruction, removal or personal use of records is prohibited by the *Title 18, U.S. Code, Section 2071*.

100.3 RETENTION AUTHORITIES

- a. Title 44, United States Code (U.S.C.) 3101 - Requires that the head of each Federal agency shall make and preserve records containing adequate and proper documentation of the organization, functions, policies, decisions, procedures and essential transactions of the agency and designed to furnish the information necessary to protect the legal and financial rights of the Government and of persons directly affected by the agency's activities.

- b. Title 44 U.S.C. 3102 - Requires that the head of each Federal agency shall establish and maintain an active, continuing program for the economical and efficient management of the records of the agency.
- c. Title 36 Code of Federal Regulations (CFR) Chapter XII - Subchapter B - Prescribes policies for Federal agencies' records management programs relating to records creation and maintenance, adequate documentation and proper records disposition.
- d. Managing Electronic Records - National Archives and Records Administration - An Instructional Guide - Contains directions to assure proper recordkeeping for electronic information systems, including system documentation such as operational procedures, data integrity controls, database definitions and computer code documentation.

100.4 WHAT IS A RECORD?

Everything, regardless of physical form, made or received by the Agency and preserved or appropriate for preservation as evidence of the organization, functions, policies, operations and other activities of BPA or because of the value of the information. *Examples include, but are not limited to, letters, memorandas, forms, contracts, environmental impact statements, customer bills, maps, engineering drawings, insurance policies, photographs and audio and video records.*

100.5 WHAT IS A NON-RECORD?

Some records retained by an organization are non-record. Non-records are scheduled for retention because they are of short-term interest and have no documentary or evidentiary value. Non-records should be retained while useful and then destroyed. Non-records cannot be placed in inactive records storage. *Examples include, but are not limited to working files, routing slips, reference files, reading files, brochures, catalogues, price lists and non-BPA publications.*

100.6 TYPES OF NON-RECORDS

The list below describes the types of non-records used at BPA:

1. Convenience Copies:

Convenience copies are duplicates of an official record. They are used in organizations other than the Office of Record or are an additional copy held in Office of Record for other uses. While convenience copies may have a litigate business use, they should be destroyed as soon as possible. Convenience copies are never kept any longer than the official record and cannot be placed in inactive records storage.

2. Personal Papers:

Personal papers are non-records that pertain to personal activities not related to work performed at BPA. Personal papers cannot be placed in inactive records storage or in ERMS and must be kept separate from BPA records in clearly marked files.

Examples include, but are not limited to, copies of performance evaluations, pay stubs or course material for professional development.

100.7 WHAT ARE ELECTRONIC RECORDS?

The rules governing records management apply to all records regardless of media. The principles applied to paper records are the same for electronic records.

100.8 TYPES OF ELECTRONIC RECORDS

The list below describes the types of electronic records used at BPA:

1. Email:

Email is a means of communication, not a record keeping system. The content of the email determines if it is a record. *Examples include, but are not limited to, messages that convey policy or provide rationale for official decisions.* If the email meets the criteria of a record, it must be saved and managed like any other record.

2. ERMS:

The Electronic Records Management System (ERMS) is the only approved system for Records Management at BPA. The system manages electronic records throughout their lifecycle by offering retention-relevant functionality to ensure the preservation and final disposition of records. Records libraries are created based upon Office of Record and permissions are applied that allow for a safe and reliable depository.

3. Electronic Systems:

Appropriate media and systems for storing Federal records throughout their life cycle should:

- Permit easy retrieval in a timely fashion
- Facilitate distinction between record and non-record material
- Retain records in a usable format until final disposition/destruction occurs
- When appropriate, meet requirements for accessioning permanent records into the National Archives
- Include a data migration and destruction plan
- Facilitate records authentication and verification

100.9 WHAT ARE VITAL RECORDS?

Vital Records contain information essential to the survival of the Agency. They enable BPA to continue operations without delay during and after a disaster. They contain information that states the Agency's legal and financial position and preserves the

organization's rights including those of employees and customers. Usually only two to seven percent of the agency's records are considered to be vital.

Vital Records are often copies of active records and may be stored in any medium. Sound judgment must be used in identifying vital records and their submitted format. The people using the records during an emergency may not be the same people who use them under normal circumstances. Because of their importance, Vital Records are stored off-site at designated storage centers. In order to be effective, the records selected as vital must be kept current; therefore Vital Records are replaced when they are superseded.

100.10 TYPES OF VITAL RECORDS

The list below describes the types of Vital Records used at BPA:

1. Emergency Operating Records:

Records essential to continued functioning or reconstitution of BPA during and after an emergency or disaster. *Examples included, but not limited to, emergency plans and directives, orders of succession, delegations of authority, staffing assignments, selected program related policy or procedural records that assist staff in conducting operations under emergency conditions and for resuming normal operations after an emergency.*

2. Legal and Financial Rights Records:

Records essential to protect the legal and financial right of the Government and of the individuals directly affected by its activities. *Examples included, but not limited to, payroll records, retirement records, insurance plans, accounts receivable and payable records.*

100.11 OFFICE OF RECORD

The Office of Record for a record series is that office which, by definition of its mission or function, has primary responsibility for maintenance and retention of record material. This responsibility is mandated by law, regulation or executive decision.

100.12 RETENTION PERIODS

Retention periods for records are mandated by Congress and managed through the National Archives and Records Administration (NARA) headed by the Archivist of the United States. BPA's Records Manual, including its retentions, has been approved by NARA.

100.13 LITIGATION HOLDS

A litigation hold is when data is preserved relevant to a lawsuit or an anticipated legal action. When you are advised of a Litigation Hold, you are to immediately refrain from

destroying/deleting all records, regardless of media, and information that pertain to the Litigation Hold subject matter.

100.14 ORGANIZATION FILE OUTLINES

An Organization File Outline is a document used to identify all the file series an organization has been identified as being “Office of Record” for in the BPA Records Manual. The outline lists the file series and their retentions. The outlines are a living document and must be kept current as changes occur. This is eForm BPA 1324.10e.

200 PUBLIC INFORMATION RECORDS

200.1 SCOPE

As a Federal Agency, BPA must abide by rules and regulations regarding external requests for information.

200.2 TYPES OF PUBLIC INFORMATION RECORDS

The list below describes the types of public information records used at BPA:

1. Public Records:

A Public Record is organized documentation showing how a major policy or final action is reached. Public Records are developed as part of the Administrative Record by BPA for policies and actions for which a public involvement procedure is conducted. The record commences when BPA issues a notice of intent proposal or otherwise initiates a public involvement process, and closes when the Administrator issues a Decision Document or other statement of final action. Each organization that generates Public Records are responsible for their creation, maintenance, use and retention. *Examples include, but are not limited to, documents compiled in support of BPA's rate cases, major power marketing policies, acquisition of major resources and actions having a significant effect on the environment.*

By law, the public has access to BPA's Public Records and they show accountability of BPA actions. Please contact the Program Office or Communications staff for guidance or additional information.

2. Freedom of Information Act:

BPA's complete policy and procedures for implementing the Freedom of Information Act (FOIA) are available through BPA's FOIA Officer. A summary of BPA's policy and procedures for responding to FOIA requests is located in the BPA Manual at Chapter 152.

3. Privacy Act:

The Privacy Act of 1974 requires that individuals from whom personal information is directly solicited be advised of their rights at the time of solicitation. Privacy Act records maintained by BPA contain an item or collection of information bearing an individual's personal information. *Examples include, but are not limited to, name, fingerprints, photographs, educational background, financial transactions, medical history, criminal record or employment history.*

BPA's complete policy and procedures for the Privacy Act of 1974 are available through BPA's Privacy Act Officer.

300 BPA'S RECORDS MANUAL

300.1 SCOPE

BPA's Records Manual is prepared by the Records Officer and staff to provide guidance on BPA's Records Management procedures. The BPA Records Manual identifies all the file codes and their associated retentions approved by The National Archives and Records Administration (NARA) that insure compliance with all the rules and regulation that govern Federal records. The BPA Records Manual is BPA's Records Management policy.

300.2 RESPONSIBILITY

Each manager/supervisor is responsible for reviewing their organization's file codes at least annually to determine if the proper records retention schedule is adequate and that the records retention schedule is being followed. Please notify Records Management of any changes.

The BPA Records Officer is responsible for obtaining approval from The National Archives and Records Administration (NARA) for all retention periods in the BPA Records Manual.

300.3 MANUAL FORMAT

The BPA Records Manual is organized into chapters by function, not organization.

1. File Code/Recurring Subjects:

File codes are a functional classification system for BPA records. File codes contain the primary (functional area), secondary (subject area) and/or tertiary (process or task areas) code assigned to the record series. File Codes are listed in alphabetical then numerical order.

Recurring subjects represent general functions that **may** occur as part of any **primary, secondary, tertiary** or case file code. Recurring subjects allow numerous documents to be separated without dividing a subject into detailed subtopics.

When using the recurring subjects, use the specified single-digit (1-8) code as a final suffix to any other filing code.

BPA's Recurring File Subjects

- 1- Authorizations
- 2- Case File
- 3- Correspondence
- 4- Directives
- 5- Evaluations
- 6- Meetings
- 7- Planning
- 8- Reports

2. Record Series Title and Description:

Record Series titles and descriptions describe a group of related records filed together in a united arrangement relating to the same function or activity.

i. New File Codes/Changing Existing File Codes:

New file codes can be developed or existing file codes can be modified. If your organization would like to add or modify an existing file code please contact Records Management for instructions.

Note: If a file code as multiple organizations listed as Office of Record, all organizations must be in agreement to the modification.

ii. Withdrawn Subjects:

File codes no longer in use have been removed from the Records Manual at the request of the program office. For a listing of withdrawn file codes, please contact Records Management.

3. Office of Record:

The organization, by definition of its mission or function, has primary responsibility for the maintenance and retention the record. Only the Office of Record can send boxes to BPA's records storage area or retrieve records from storage. Only the Office of Record can retain or retrieve records from inactive record storage or upload into ERMS libraries.

Note: The code **Z** is used to represent the potential that all organizations might be the Office of Record for that file code.

4. Retention Period:

The retention period defines the length of time each file code is to be maintained and when or if it may be destroyed.

Note: NI-305-07-01 cites the approval authority for this retention schedule. This information is primarily for use by Records Management.

5. Contingent Schedules:

Many file codes in BPA's Records Manual have contingent schedules. Contingent schedules have an event or specified period of time that helps determine the retention of the file code.

i. Types of Contingent Schedules:

Below are common terms used to help calculating a file codes with contingent schedules. While individual file codes should specify their own contingent definitions, examples include, but are not limited to those described below:

a) Active

- Life of equipment, contract or warranty
- Period prior to close of a case or the completion of a project
- On separation or transfer of employee
- Until regularly scheduled audit occurs

b) Superseded/Obsolete

- Material becomes outdated as related new material is developed
- New material replaces or revokes old material
- Material no longer of use or no longer needed by BPA

6. Permanent Retentions:

Permanent records are offered to the National Archives and Records Administration (NARA) who decides on a case-by-case basis whether historical retention is appropriate.

400 RECORDS DISPOSITION

400.1 SCOPE

Records disposition is the regular and systematic process of purging records that have expired retention periods.

Records must be maintained throughout their lifecycle. Once records are no longer frequently referenced, but still must be retained, paper records can be placed in inactive records storage and electronic can be uploaded into ERMS.

Federal records may not be legally destroyed while a Litigation Hold is in place or prior to expiration of the approved retention period.

400.2 RESPONSIBILITY

Paper records transferred to inactive records storage or ERMS are destroyed according to the approved retention schedule.

Organizations will respond in a timely manor to disposal authorizations.

All stored records are managed by BPA's Records Management staff.

400.3 STORAGE REQUIREMENTS FOR PAPER RECORDS

To send paper records to inactive records storage, the records must be Federal records, with approved retention periods, the requestor must be the office of record and the boxes must be in storage for at least one year.

400.4 OBTAINING PAPER RECORDS STORAGE BOXES

Records need to be stored in regulation storage boxes – not moving boxes. Records Management maintains a supply of storage boxes and issues them on an accountable basis at no charge to the client. Please contact Records Management for details.

400.5 PACKING PAPER RECORDS FOR STORAGE

Pack records storage boxes using the following guidelines:

- Pack boxes so they can easily be lifted.
- Pack letter-size records facing the front of the box. The word "Front" is printed on the front of the box. Place legal-size and end-tab records lengthwise.
- Place records with the same file codes together.
- Remove records from binders and remove all metal binder clips.
- Once completed, place a copy form BPA 1324.07e in the first box only of each series. (See Section 400.6)
- Write in the "Box Number" block on the box, the number position within the accession. (1 of 1; 2 of 5, etc.)
- When assigned, prepare accession number and location labels affixing them on the front of the box on the right side. (See Section 400.6) Use the Avery mailing label #5161 (1x4 inch). Set the type to Bold, 28 font size and centered. Type the accession number on line one and location number on line two.
- Do not write any further information on the outside of the box.
- Do not tape or otherwise seal the box.

400.6 SENDING PAPER RECORDS TO STORAGE

The eForm BPA F 1324.07e (see Forms Library) is used to send inactive records to records storage. The client fills out the form and sends it via e-mail to Records Management for review at “Records Mgmt” email address. Records Management approves the transfer and assigns an accession number and location and emails the form back to the client. Upon receipt of the form, the client prints out two copies, one for the client’s records and one to go in box one of the accession. Records Management can arrange for the boxes to be taken from the client’s area and placed on the shelves in Records Storage.

400.7 RETRIEVING PAPER RECORDS FROM STORAGE

The client prepares eForm BPA 1324.03e (see Forms Library) and emails the request to Records Management at “Records Mgmt” email address. For BPA-stored records, routine delivery is within one working. Normal hours of operation end at 3 pm. Telephone requests will be taken in emergencies. Records being stored at off-site locations have a significantly longer delivery time.

400.8 RETURNING PAPER RECORDS TO STORAGE

It is the client’s responsibility to update the checkout eForm 1324.03e if all records are not returned. Return the form to Records Management either through interoffice mail or by attaching to the box. Coordinate the return of the records with Records Management.

400.9 DESTRUCTION OF RECORDS

Records that have met their retention as defined in the BPA Records Manual are eligible for destruction unless:

- The records are needed for pending litigation
- An outstanding request exists for inspection or review of the records

Records Management will send a notification prior to the destruction of any records. The only exception to this practice is Leave Slips in ERMS.

Confidential, sensitive and Privacy Act Information records will be shredded. All other records will be recycled.

KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
1099 reporting	FI-16-11	Act, Bonneville Project	LW-27-12
110-kV tests	OP-19-16	Act, Clean Air	EQ-20-13
551, Multi-district litigation	FI-20-16	Act, Clean Water	EQ-20-11
A-11, BPA response to OMB circular	MN-18	Act, Comprehensive Environmental Response and Liability	EQ-17
A-127, OMB Circular	FI-26-13	Act, Comprehensive Environmental Response and Liability	EQ-20
A-76, OMB Circular	MN-16-11	Act, emergency community right to know	EQ-18-13
AC interties	ED-14-11	Act, Endangered Species	EQ-21
Access procedures	IR-20	Act, Ethics in Government	PE-38
Access road bridge work	ED-32	Act, Federal Manager's Financial Integrity	MN-17-17
Access roads, location and design	ED-15-24	Act, Freedom of Information	EX-13-13
Access roads, maintenance	MA-12-11	Act, Freedom of Information	LW-15
Access to records, Freedom of Information Act	EX-13-13	Act, Northwest Power	LW-15
Access, computer center authorizations	IR-14	Act, Northwest Power	LW-28-11
Accessories, conductor and hardware	ED-15-14	Act, Northwest Power	LW-28-12
Accidents, motor vehicle	PE-53-13	Act, Northwest Power	LW-28-14
Acclimation of fish	FW-24	Act, Pacific Northwest Power	BU-14-16
Accomplishments	Recurring code 6	Act, Paperwork Reduction	SS-15-11
Accounting, automatic generation control	OP-22-16	Act, Privacy	LW-15
Accounting, conservation	FI-11-12	Act, Prompt Payment	FI-17
Accounting, manual and automated	FI-26	Act, Resource Conservation and Recovery	EQ-18-11
Accounting, plant	FI-12	Act, Superfund Amendments and Reauthorization	EQ-17
Accounting, property	FI-13	Act, Superfund Amendments and Reauthorization	EQ-20
Accounting, separate	FI-29-11	Act, Toxic Substance Control	EQ-18-12
Accounting, separate	LW-28-17	Activities, employee	PE-35
Accounts payable, FMIS	FI-26-11	Activity reports	MN-13
Accrual of retirement credit	FI-19-21	Acts, BPA responses to Federal environmental	LW-22-12
Acid rain	EQ-20-13	Adjustments, weather	RP-37
Acquisition and management of land rights	LA-14; LA-17; LW-27-11	Administrative activities	MN
Acquisition methods	RP-17-11	Administrative leave	PE-32
Acquisition recommendations	IR-15	Administrative officers'/supervisors' personnel files	PE-11-13
Acquisition, land	LA-14	Administrator's chronological	SS-11-11
Acquisition, power	PM		
Act, Bonneville Project	LW-15		

***RECURRING** file codes may be attached to any official PRIMARY, SECONDARY, or TERTIARY file code.

KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
file		Agreements, land	LA
Administrator's fund	BU-13-16	Agricultural sector conservation	CN-13
ADP coordination	IR-24	Air pollutants	EQ-20-13
ADP hardware	IR-15	Air quality	EQ-25
ADP resource management reporting system	FI-26-16	Air quality, national ambient standards	EQ-20-13
ADP security	IR-14	Aircraft	TT-14
ADP software and computer programs	IR-18	Aircraft maintenance	TT-14-14
ADP standard operating procedures	IR-19	Airway lighting	ED-15-20
ADP-related technical reviews	IR-13	Airway Lighting and Obstruction Markings	ED-15-20
Advanced Hydro Turbine	PA-14-11	Alarm procedures, PSC	OP-21-15
Advanced Hydro Turbine Research	PA-14-11	Alarm requirements features	OP-25-20
Adverse action	PE-42	Allocations, BPA	BU-13-13
Aerial photographs	LA-23-11	Alternate payment methods	FI-17-11
Affirmative employment plan	PE-36-16	Alternate route requirements, telemetry	OP-22-19
After-the-Fact	TM-31	Alternative financing	FI-20
AGC accounting	OP-22-16	Amortization, project	LW-28-17
AGC and line load charts	OP-22-18	Amortization, rate-related	FI-28
AGC at Spokane (Munro) control center	OP-22-22	Analyses, capital	BU-13-17
AGC cost of service-load following	OP-22-15	Analyses, program and reporting	BU-13-18
AGC interim spinning reserve	OP-22-11	Analysis	Recurring code 7
AGC powerhouse data acquisition system	OP-22-12	Analysis of fish passage and survival	FW-29
AGC telemetry	ED-17-16	Analysis, cost	RP-18
Agency forms	SS-13	Analysis, cost of service	PM-14-16
Agency space management	SS-14-12	Analysis, direct stability	OP-15-14
Agendas	Recurring code 6	Analysis, economic	RP-18
Agreement, exchange transmission credit	FI-27	Analysis, electrical clearance	ED-15-32
Agreement, intra-agency memorandum of	MN-15	Analysis, income	RP-18
Agreement, residential purchase and sale	FI-27	Analysis, management	MN-16
Agreements, Canadian	RP-16-13	Analysis, marginal cost	PM-14-17
Agreements, joint operating and coordination	OP-14	Analysis, power project	RP-24
		Analysis, rate	PM-14
		Analysis, Value of Power Products	PA-11-16
		Analytical stereoplotter systems	LA-23-13
		Analytical tools/modeling techniques	RP-18-11
		Ancillary Services (Industry	RE-23

***RECURRING** file codes may be attached to any official PRIMARY, SECONDARY, or TERTIARY file code.

KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Restructuring)		FCRPS	
Annual leave	PE-32	Assistance, computer	IR-21
Annual management plan	MN-15-11	Associates	PE-35
Annual report	EX-11-12	Assured operating plan	RP-16-18
Annunciators	ED-17-15	Assured operating plan-- hydroelectric studies	RP-16-19
Annunciators, general	OP-18-16	ATC (Available Transfer Capability)	TM-24
Antiharassment	PE-39	ATF	TM-31
AOP	RP-16-18	Attendance and leave administration	PE-32
AOP hydroelectric studies	RP-16-19	Audible noise	ED-11-13
Appeals	LW-18	Audiovisual	EX-11-11
Appeals, classification	PE-28-16	Audiovisual products/policies/processes	EX-11-11
Applications, employment	PE-20-12	Audit, environmental	EQ-17
Applications, FERC	RP-24	Audits by Inspector General	MN-17-18
Applications, Outages	OP-12-13	Audits, BPA	MN-17-11
Applications, software	IR-22	Audits, custodian account	FI-13-14
Apportionment, OMB	BU-13-11	Audits, DOE	MN-17-12
Appraisal, environmental	EQ-17	Audits, GAO	MN-17-13
Appraisal, land	LA-12	Audits, general	MN-17
Appraisals	Recurring code 5	Authorizations	Recurring code 1
Appraisals, non-SES performance	PE-25-14	Authorizations for computer center access	IR-14
Appraisals, program	MN-16	Authorizations, disposal (records)	SS-15
Appraisals, SES performance	PE-25-15	Automated accounting	FI-26
Appreciation letters, employee	PE-26-16	Automated database	IR-17
Appreciation letters, public	EX-12-12	Automated systems	IR-18
Apprenticeship programs	PE-24-19	Automated systems security	IR-14
Apprenticeship promotion	PE-18-11	Automation, office	IR-15
Aquatic Nuisance Species	EQ-26	Availability and reliability, report on RODS	OP-26-15
Arbitration decisions	PE-34-16	Average system cost	FI-27
Architectural work	ED-31	Average system cost review	LW-28-14
Arcs, visible	OP-19-12	Awards for materials, supplies, and equipment	SU-12
Artificial production	FW-24	Awards, cash	PE-26-17
ASC methodology	FI-27	Awards, employee	PE-26
ASC methodology	LW-28-14	Awards, honor	PE-26-18
ASC review	LW-28-14	Awards, monetary	PE-26-17
As-constructed drawings	ED-18-13		
Assessments	Recurring code 5		
Assessments, environmental	EQ-13		
Assessments, fish stock	FW-39		
Asset Management Planning,	PA-11		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Awards, nonmonetary	PE-26-18	BPA merit promotion plan	PE-18-11
Background material to work orders	ED-13-11	BPA occupied buildings	SS-14
Backup, SCADA	OP-27-18	BPA owned vehicles	TT-13-12
BALTS	OP-16-22	BPA personnel management	PE-13-12
Banking	FI-21-11	BPA publications	EX-11-15
Bankruptcies	LW-17	BPA rate hearings	LW-28-11
Base maps	LA-23	BPA responses to environmental policies	LW-22-11
Basic data, utility/customer	RP-26	BPA responses to Federal environmental acts	LW-22-12
Bellingham area load trip scheme	OP-16-22	BPA Specifications	SU-15-12
Bench levels	LA-24-12	BPA's debt to U.S. Treasury	FI-29-13
Benchmark lists	LA-24-11	Brake, Chief Joseph	OP-16-19
Benefit/Cost (Industry Restructuring)	RE-19	Breakers, power circuit	ED-17-14
Benefits, employee	PE-47	Breaking, dynamic	ED-21-15
Bill of lading for goods	TT-12-11	Broadcasting	EX-11-14
Bill of lading, government and commercial	TT-12	Bucket trucks	TT-13
Billing and Settlements (Industry Restructuring)	RE-17	Budget Formulation System	BU-11-15
Billing source data	PM-11-17	Budget instructions	BU-11-15
Billing, Transmission	TM-18	Budget, BPA	BU-11-15
Billings	FI-23	Budget, Congressional	BU-11-19
Billings, OWCP chargeback	PE-44-11	Budget, internal	BU-11-15
Billings, power	PM-11-19	Budget, OMB	BU-11-18
Bills, common carrier transportation	TT-12-11	Budget, water	FW-32
Biomass resources	RP-21-16	Building Facilities Design and Construction Support	ED-31
Blood drive	PE-33	Building plan files	SS-14-12
Bond refinancing	FI-20-19	Buildings, management of BPA-occupied	SS-14
Bonds and notes, sale of	FI-21-12	Buildings, protection of	SS-18-11
Bonds, U.S. savings	FI-19-13	Bulletins	Recurring code 4
Bonds, WPPSS project	FI-20-17	Bulletins, operating	OP-32
Bonneville Project Act	LW-27-12	Buying card payments, accelerated	FI-17-11
Book, red	CN-11	Cable, commercial	IR-16
Book, white	RP-23-14	Cables, underground power	ED-15-19
Borrowing	FI-21-12	CAD	LA-26
Boundary and BC Hydro schemes	OP-16-18	Cadastral, location line, and control surveys	LA-24-11
BPA clearing design	LA-23-16	Call memos, budget	BU-11-15
BPA conservation programs	LW-21-11	CAM	LA-26
BPA litigation	LW-20-11	Canada, treaties with	LW-25-11

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Canadian agreements	RP-16-13	Certificate of eligibles	PE-21-16
Canadian Participation (Industry Restructuring)	RE-27	Certificates, export and transit	TT-12
Canadian plant data	RP-16-16	Certificates, property relief	FI-13-11
Canadian projects	RP-16-11	Certificates, training	PE-24
Capacitor switching	ED-21-14	Certification files	PE-21-18
Capacitors	OP-20-11	Certified mail	SS-12
Capacitors, PCB	EQ-18	CFC	PE-33
Capacitors, shunt	ED-17-14	Changes to computer applications	IR-19
Capacity Allocation	TM-29	Chargeback billings, OWCP	PE-44-11
Capacity Coordination	TM-36	Charts, AGC and line load	OP-22-18
Capacity types	RP-14	Charts, demand graph	PM-11-17
Capacity, firm	RP-14-11	Charts, organizational	MN-11
Capital analyses	BU-13-17	Charts, temperature	MA-11-12
Capital investment	FI-12	Charts, voltage	OP-20-19
Capital Program Budget Management, FCRPS	PA-12-11	Check, meter	OP-22-17
Capital Program, FCRPS	PA-12	Checks	FI-16
Capital programs, funding of	FI-21-12	Chief Joseph brake	OP-16-19
Capital Subagreements	PA-12-18	Child care	PE-49
Captions	EX-11-11	Choices, strategic	MN-15
Card key summaries	SS-18-11	City government affairs	EX-15-14
Career counseling program	PE-50	City/municipality government affairs	EX-15-14
Career fairs, EEO	PE-36-13	Civil Service Retirement System	PE-45
Career/career-conditional employment	PE-17	Claims against the BPA	LW-19
Carpentry request	SS-19	Claims by BPA	RK-12-11
Carpool	SS-14-11	Claims by BPA employees	LW-19-12
Carrier files	TT-12-13	Claims by non-BPA employees	LW-19-11
Case file	Recurring code 2	Claims, tort	LW-19-11
Cash awards	PE-26-17	Classification appeals	PE-28-16
Cash flow	FI-21-13	Classification studies/surveys	PE-28-17
Cash management	FI-21	Classification, GS position	PE-28
Catalog, Ross stock	SU-14-13	Classified documents	SS-18-14
Categorical exclusions	EQ-15-11	Clean air act	EQ-20-13
Census, fish	FW-39	Clean water act	EQ-20-11
Central and remote time transmission	OP-23	Cleanup program, DEQ	EQ-18
Central guard office master logs	SS-18-11	Clearance analysis	ED-15-32
CERCLA	EQ-17	Clearance procedures	OP-14
CERCLA	EQ-20	Clearance, conductor	ED-15-31
		Clearances, personnel security	SS-18-12
		Clearing	MA-12-11
		Clearing scheme, dead bus	OP-17-12

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Client support, IR	IR-21	Compliance reviews	FI-13-14
Closeout agreements	CN	Comprehensive Environmental Response Compensation and Liability Act	EQ-17
Closure, Ross (dangerous waste areas)	EQ-18	Comprehensive Environmental Response Compensation and Liability Act	EQ-20
COG	MN-16	Computer assistance	IR-21
Cogeneration resources	RP-21-17	Computer center access	IR-14
Cogeneration, power transactions	PM-12-22	Computer center access, authorizations	IR-14
COI	TM-36	Computer center training material	IR-20
Colstrip integration control scheme	OP-16-21	Computer operations	IR-19
Columbia Basin fish and wildlife program	FW-24	Computer programs	IR-18
Columbia Basin Water Transactions Program	FW-32-11	Computer security	SS-18-13
Columbia River Basin	FW-24	Computer-assisted design	LA-26
Columbia River Salmon Passage	FW-29	Computer-assisted mapping	LA-26
Columbia River System	FW-29	Computer-related hardware	IR-22
Columbia River Treaty	RP-16	Concerns, geotechnical	ED-15-25
Columbia Vista (CV)	ES-02-11	Condemnation	LA
Combined Federal Campaign	PE-33	Conduct, employee	PE-39
Commendation letters, employee	PE-26-16	Conductor clearance	ED-15-31
Commendation letters, public	EX-12-12	Conductor stringing	ED-15-28
Commercial bill of lading	TT-12	Conductors	ED-15-14
Commercial cable	IR-16	Conferences	EX-12-11
Commercial insurance policies	RK-12	Conferences	Recurring code 6
Commercial sector conservation	CN-14	Confirmation of small purchase	FI-17
Commercial telephone service	IR-16	Conflict of interest	LW-17
Committees	Recurring code 6	Conflict of interest	PE-39-12
Common carrier transportation	TT-12	Congestion Management/Cataloguing (Industry Restructuring)	RE-12
Communication protection	ED-20	Congressional budget	BU-11-19
Communications, FCRPS	PA-11-17	Congressional hearings	EX-13-16
Community outreach	PE-33	Congressional issues about conservation	LW-21-12
Community right to know act, emergency	EQ-18-13	Congressional relations	EX-15-12
Compensation, injury	PE-44	Conservation	CN
Compensator, static volt-ampere reactive	ED-17-17	Conservation accounting	FI-11-12
Competitiveness project	MN-18	Conservation issue forecasts	RP-32
Complaints, public	EX-12-12	Conservation marketing	CN-11
Completed forms	Recurring code 3		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Conservation programs	CN-12	Contact with NWPPC	EX-15-18
Conservation, agricultural sector	CN-13	Contact with others	EX-15
Conservation, commercial sector	CN-14	Contact with private utilities	EX-15-16
Conservation, Congressional issues about	LW-21-12	Contact with public	EX-15-20
Conservation, energy	CN	Contact with PUDs	EX-15-16
Conservation, industrial sector	CN-15	Contact with States	EX-15-13
Conservation, legal issues about	LW-21	Contact with utility organizations	EX-15-16
Conservation, power transactions	PM-12-25	Contacts with PUDs	EX-15-16
Conservation, residential sector	CN-16	Contaminants, environmental	EQ-19
Conservation, utility sector	CN-17	Contingency plans, control centers	OP-21-17
Consoles/displays/group boards, dispatcher's	OP-21-16	Contingency selection	OP-15-13
Construction and environmental issues	ED-19	Contract administration, power	PM-11-13
Construction data books	ED-15-12	Contract compliance	FI-23
Construction Interties	MA-19	Contract development and negotiation, power	PM-11-12
Construction of fiber optics	MA-20-11	Contract management system, power	PM-11-11
Construction of substations	TM-16	Contract Support Material (Transmission)	TM-12-11
Construction of transmission lines	TM-16	Contracting other than procurement	LW-26-12
Construction of transmission lines	MA-19	Contracting, legal issues about	LW-26
Construction project authorizations	ED-13	Contracts	SU-12
Construction project authorizations	FI-12-13	Contracts, authenticated work copies, power	PM-11-15
Construction specifications	ED-15-26	Contracts, dropped	TM-12-14
Construction support	ED	Contracts, master authenticated power	PM-11-14
Construction, environmental procedures	EQ-12-11	Contracts, original power	PM-11-14
Construction, power transactions	PM-12-29	Contracts, service	SU-15-15
Construction, system	ED-18	Contracts, terminated	TM-12-14
Consultations, ESA Section 7	EQ-23	Contractual authority	LW-26-12
Contact with American Indian tribes	EX-15-15	Control center interface	OP-21-18
Contact with cities/municipalities	EX-15-14	Control center, AGC at Spokane (Munro)	OP-22-22
Contact with energy councils	EX-15-19	Control centers	OP-21
Contact with Federal entities and officials	EX-15-12	Control centers' contingency plans	OP-21-17
Contact with foreign entities	EX-15-11	Control project diagrams	ED-17
Contact with industries	EX-15-17	Control scheme, Puget Sound reliability	OP-16-23
Contact with non-BPA interests	EX-15	Control systems	ED-24

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Control systems monitor	OP-25-11	CPAs	FI-12-13
Control systems, HVDC	ED-24-16	Craft, Apprenticeship and Trainee programs in	PE-24-19
Control, spill prevention	ED-19-12	Craftsman promotion	PE-18-11
Control, system protection	MA-14	Cranes	TT-13
Controlled mail log	SS-11-12	Credit cards, BPA's use of	FI-17-11
Convenience copiers	SS-16-11	Credit hour logs	FI-18-11
COOP	SS-18-19	Credit management	FI-22
Cooperative education	PE-17	Credits, Fish and Wildlife	FI-31
Coordinated planning	IR-12	Criteria, system reliability	ED-23
Coordination of work	OP-14	Criticism, public	EX-12-12
Coordination, ADP	IR-24	Cross sections	LA-24-12
Coordination, environmental	EQ-12	Crossings, line	ED-15-17
Coordination, inductive	ED-11-12	CRTs, RODS and SCADA	OP-26-22
Coordination, insulation	ED-11-12	CSM	OP-25-11
Coordination, Mid-Columbia	OP-22-20	CSRS	PE-45
Copier management program	SS-16-11	CTS	OP-23
Copiers, convenience	SS-16-11	Cultural Resources	EX-15-15
Copyrights	LW-26-13	Current monitoring, geomagnetic-induced	OP-25-23
Correspondence	Recurring code 3	Curtailment, load	OP-20-16
Correspondence management program	SS-11	Curtailment, loop flow procedures	OP-11-15
Corrosion	ED-15-23	Custodian account audits	FI-13-14
Cost analyses of overhead cost pools	FI-25	Custodians, personal property	FI-13-14
Cost analysis	RP-18	Custodians, property	FI-13-13
Cost detail reports, time and attendance	FI-11-11	Customer and transmission outages	OP-30
Cost of service analysis	PM-14-16	Customer bills	PM-11-17
Cost of service, AGC	OP-22-15	Customer bills	PM-11-19
Cost records, plant construction	FI-12-12	Customer files	PM-11
Cost recovery systems (ADP- related)	IR-12	Customer load projections	RP-26
Cost-reduction activities	MN-16	Customer relations	PM-11
Council, pluralism	PE-39-13	Customer schedules and studies	PM-14-21
Councils, national/regional/local energy	EX-15-19	Customer Service	TM-33
Counseling records	PE-36-15	Customer service substation	OP-18-11
Course contents	PE-24-21	Customer transmission system data	ED-21-11
Court leave	PE-32	Customer utility	ED-21-11
Courts' review of BPA's rates	LW-28-13	Customs, import/export	TT-12-15
CPAs	ED-13	CV	ES-02-11
		CWA	EQ-20-11

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Daily interruption reports	OP-11-13	inspections	
Daily progress report	MA-20	Depletion, streamflow	RP-22-11
Damage to private property	LW-27-12	Depreciation expense	FI-12-13
Dams, non-Federal	OP-22-20	Depreciation summaries	FI-12-13
Danger trees	LA-15	Descriptive inventories	SS-15
DARTS	MN-17-16	Design	Recurring code 7
Data books, construction	ED-15-12	Design and construction, engineering	ED
Data books, system electrical	ED-25	Design and programming of automated systems	IR-18
Data exchange, interutility	OP-21-18	Design, human factors	OP-21-16
Data files, security	IR-14	Design, transmission	ED-15-13
Data Requests and Responses	RP-24-13	Designation of acting manager	MN-1
Data sheets, facilities	SS-18-11	Destinations, substation and storage yard shipping	TT-12-14
Data, billing source	PM-11-17	Detail ledger summary reports	FI-11-11
Data, customer transmission system	ED-21-11	Detailed operating plan	RP-16-20
Data, flow	OP-30-11	Details, employment	PE-17
Data, load	ED-21-12	Development, research	ED-12
Data, project	ED-13-11	Development, software	IR-18
Data, test	ED-18-11	DG charts	PM-11-17
Database management	IR-17	Diagrams, control project	ED-17
Database, automated	IR-17	Dictation tapes	EX-11-11
Database, rate	PM-14-11	Digital data	LA-23-15
Database, resource program	RP-13-12	Direct bill lodging program	TT-16
Database, RODS rotary account	OP-26-17	Direct service industries	EX-15-17
Databooks, generation and load	OP-30-11	Direct stability analysis	OP-15-14
DC interties	ED-14-12	Direct-hire programs	PE-21-13
DC modulation	ED-21-16	Directives	Recurring code 4
DCC SCADA	OP-27-20	Directives, formal	MN-14
Dead bus clearing scheme	OP-17-12	Directory listings	IR-16
Debt collection	FI-22	Disaster management	SS-18-18
Debt instruments, third-party	FI-20-18	Discipline, employee	PE-42
Debt management	FI-22	Disconnect switches, design of transmission	ED-15-33
Debt service reserve fund	FI-20-17	Discount, low density	PM-14-20
Debt, net	FI-29-13	Discrimination complaints	PE-36-14
Delegations of authority	MN-22	Disease, fish	FW-24
Demand graph charts	PM-11-17	Dispatch	OP-11
Demand side management	RP-33	Dispatch logs	OP-11-11
Demonstration, research, development and	ED-12		
Demurrage report	TT-12		
Dental insurance	PE-47		
Department of Energy	SS-18-11		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Dispatcher actions	OP-30	Driving awards	PE-53-14
Dispatcher guides	OP-11-14	Driving records, employee	PE-53-14
Dispatcher's displays/conssoles/group boards	OP-21-16	DSI	EX-15-17
Dispatcher's recordings	OP-11-12	DTLML	OP-25
Display system, RODS	OP-26-22	Duplication	SS-16
Disposal authorizations, records	SS-15	Duty, hours and places of	PE-31
Disposal of land and land rights	LA-16	Dynamic breaking	ED-21-15
Disposal, furniture	SU-14-15	EAP	PE-46-14
Disposal, material	SU-14-15	Earthquake	SS-18-18
Disposition of personal property	FI-13	Earthquakes	ED-19-14
Disposition of records	SS-15	Eastern Control Center	OP-21-12
Distribution/mailling lists	SS-12-11	ECC	OP-21-12
Dittmer Control Center	OP-21-11	ECC dispatch jurisdiction	OP-27-19
Dittmer SCADA	OP-27-20	Economic analysis	RP-18
Diversity	PE-39	Economic forecasts	RP-29
Document Budget Appendix, OMB	BU-11-18	Education, public	EX-13-11
Document protection	SS-18-14	EEO	PE-36
Documentation and change control, RODS	OP-26-16	EEO reporting	PE-36-16
Documentation, expenditure	FI-17	Efficiencies program	PC
Documents, classified	SS-18-14	Efficiency Improvements	RP-20-14
DOE audit report tracking system	MN-17-16	Efficiency, maintenance	MA-16
DOE audits	MN-17-12	Efficiency, water-use	OP-22-20
DOE departmental inspections	SS-18-11	EIS	EQ-14
DOE personnel management	PE-13-11	Electric fields	ED-11-14
Domestic (residential)	RP-27-11	Electrical clearance analysis	ED-15-32
Domestic travel	TT-16	Electrical data books, system	ED-25
Donated leave	PE-47-15	Electrical Effects	ED-11-14
Donation, material	SU-14-15	Electrical loadings	ED-15-30
DOP	RP-16-20	Electromagnetic transient program	ED-22-13
DOT HazMat registration	EQ-18	Electronic communications equipment	IR-16
Downstream benefits, Canadian-related	RP-16-14	Electronic tags	TM-27
Draft power contract material	PM-11-16	Electronic transmission	IR-16
Drawings, as-constructed	ED-18-13	Emergency community right to know act	EQ-18-13
Drawings, line	ED-15-11	Emergency management and preparedness	SS-18-18
Drawings, numbered	ED-15-11	Emergency power transactions	PM-12-30
Drawings, station	ED-17-11	Emergency standby power	OP-21-14
Driver tests	PE-53-14	Emissions, auto	EQ-20-13
		Employee activities	PE-35

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Employee assistance program	PE-46-14	Energy Northwest	FI-20-18
Employee associations	PE-35	Energy Northwest	FI-20-19
Employee awards	PE-26	Energy resources	RP-21
Employee benefits	PE-47	Energy, conservation of	CN
Employee claims	LW-18	Energy, firm	RP-14-11
Employee claims	LW-19-12	Engineering environmental considerations	ED-19
Employee claims, property loss	PE-53-15	Engineering Standards and Practices	ED-11
Employee conduct	PE-39	Engineering work	ED-31
Employee development, BPA programs	PE-24-18	Engineering, design and construction	ED
Employee development, general	PE-24	Enhancement of fish	FW-24
Employee driving records	PE-53-14	Enhancement of wildlife	FW-39
Employee ethics	PE-39	Enterprise Application Integration	PC-14-12
Employee health reports	PE-46-15	Entity report	RP-16-21
Employee insurance	PE-47	Environment, legal issues about	LW-22
Employee medical records	PE-46-13	Environmental assessments	EQ-13
Employee organizations	PE-35	Environmental audit and appraisal program	EQ-17
Employee payroll folders	FI-19-12	Environmental contaminants	EQ-19
Employee performance file system, non-SES	PE-25-14	Environmental coordination	EQ-12
Employee performance file system, SES	PE-25-15	Environmental exclusions	EQ-15
Employee recognition	PE-26	Environmental impact statements	EQ-14
Employee recognition program	PE-26-14	Environmental legal issues, project-related	LW-22-17
Employee records, permanent	PE-11-11	Environmental matters, Federal	LW-22-13
Employee records, temporary	PE-11-12	Environmental matters, state and local	LW-22-14
Employee services	PE-49	Environmental policies, BPA responses to	LW-22-11
Employee suggestions	PE-26-13	Environmental quality	EQ
Employee travel	TT-11	Environmental quality matters	LW-22-15
Employment activities/programs	PE-17	Environmental quality, public involvement issues about	LW-22-16
Employment applications	PE-20-12	Environmental reviews	EQ-16
EMTP	ED-22-13	Environmental standards and procedures	EQ-12-11
Encroachments	MA-12-11	EPA identification numbers	EQ-18-11
Endangered species act	EQ-21	EPA identification numbers	EQ-18
Energization	ED-18-12	EPCRA	EQ-18-13
Energized equipment tests	OP-19	EPIP	MN-16
Energized transmission system tests	ED-12-15		
Energy and capacity resources	RP-21		
Energy and capacity types	RP-14		
Energy Northwest	FI-20-16		
Energy Northwest	FI-20-17		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Equal Employment Opportunity	PE-36	Evaluation, candidate	PE-21-15
Equal Employment Opportunity observances	PE-36-12	Evaluations	Recurring code 5
Equal Employment Opportunity outreach	PE-36-13	Evaluations, power project	RP-24
Equal Employment Opportunity programs	PE-36-11	Evaluations, program	MN-16
Equipment and materials, substation	MA-11-12	Events, special/honorary	EX-14
Equipment and materials, TLM	MA-12-14	Ex parte	PM-16-12
Equipment load levels	OP-30	Examining	PE-21
Equipment requests, office	SU-16	Examining authority	PE-21-11
Equipment technology and office automation	IR-15	Examining system registers	PE-21-17
Equipment types	IR-15	Excepted service	PE-17
Equipment, electronic communications	IR-16	Excess material and equipment	SU-14-15
Equipment, excess	SU-14-15	Exchange forecasts	FI-27
Equipment, generation	RP-21-23	Exchange transmission credit agreement	FI-27
Equipment, heavy mobile	TT-13	Exchange transmission, power transactions	PM-12-14
Equipment, high voltage	ED-17-14	Exchange, power transactions	PM-12-13
Equipment, loans	SU-14-11	Exclusions, categorical	EQ-15
Equipment, maintenance and repair	SU-16-13	Exclusions, environmental	EQ-15
Equipment, office automation	IR-15	Executive development	PE-24-18
Equipment, SPC	MA-14-11	Exhibits	EX-11-11
Equipment, supplies and	SU-16	Expenditure documentation (formerly Vouchers)	FI-17
Equipment, word processing	IR-16	Expenses, capital	BU-13-17
Equipment, work and tools	SU-14-13	Export certificates	TT-12
Ergonomics	SS-14-13	Express mail	SS-12
Erosion	ED-15-25	External issues	EX
ESA	EQ-21	External relations	EX-15
Estimates, project	ED-13	Facilities data sheets	SS-18-11
ETCA	FI-27	Facilities management	SS-14
ETCA contracts	FI-27	Facilities, transmission and environment	ED-19
Ethics in Government Act of 1978	PE-38	Facility foundations	ED-15-25
Ethics, employee	PE-39	Facility Sales – Substations	OP-33
Ethic Code of Conduct	FI-14	Facsimile	IR-16
Ethics Program/Hotline Investigation Records	MN-17	Factory inspections	SU-15-13
Evacuation procedures, PSC	OP-21-15	Factory surveillance	SU-15-13
Evacuation, emergency	SS-18-18	Factory tests	SU-15-13
		Fast outage program	OP-15-13
		Fast power change tests	OP-19-14
		Fast valving	ED-21-17

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Fatalities	PE-53-12	Commission Review	
Fault locator acquisition recorder	OP-25-22	Federal environmental matters	LW-22-13
Fault tests	OP-19-11	Federal Manager's Financial Integrity Act	MN-17-17
FCRPS Business Transformation Program	PA-11-13	Federal Property Management Regulations	TT
FCRPS Capital Program	PA-12	Federal relations	EX-15-12
FCRPS Communications	PA-11-17	Federal telephone system	IR-16
FCRPS Hyrdo Projects	PA-13-15	Federal travel regulations	TT
FCRPS, Asset Management Planning	PA-11, PA-11-11& 12	Federal woman's program	PE-36-11
FCRPS, Capital Program	PA-12	Fee schedules	IR-20
FCRPS, Financial Statements	FI-14	FEGLI	PE-47
FCRPS, Operations and Maintenance Program	PA-13	FEHB	PE-47
FCRPS, Projects, Federal Hydro/BOR	PA-13-19	FEMA	PE-52
FCRPS, Projects, Federal Hydro/COE	PA-13-19	FERC	LW-28-12
FCRPS, Repayment	FI-29	FERC license applications and hydroelectric notices	RP-24
FCRPS, Replacements	FI-29-12	FERS	PE-45
FCRPS, Risk Assessments	PA-11-11	Fiber optics	ED-20-13
FCRPS, Separate Accounting	FI-29-11	Fiber Optics (contracts)	TM-13
Federal acts, effect on BPA	LW-15	Fiber Optics work	ED-15
Federal agencies, land policies with	LA-18	Fiber optics, construction	MA-20-11
Federal Columbia River Power System	FI-29-11	Field appraisals, environmental	EQ-17-13
Federal Columbia River Power System	FI-29-12	Field notes	LA-24
Federal Columbia River Power System financial statements	FI-14	Field survey notes	LA-24-13
Federal Columbia River Power System, investment in	FI-29	Fields, electric	ED-11-14
Federal Crime Witness Program	SS-18-15	Fields, magnetic	ED-11-14
Federal Emergency Management Agency	PE-52	File, case	Recurring code 2
Federal employees group life insurance	PE-47	File, named or numbered	Recurring code 2
Federal employees health benefits	PE-47	Filing, rate	PM-16
Federal employees retirement system	PE-45	Finance	FI
Federal Energy Regulatory	LW-28-12	Financial disclosure requirements	PE-38
		Financial interests of employees	PE-38
		Financial management information system	FI-26
		Financial statements	FI-14
		Financial transactions	FI-11
		Findings of no significant impact	EQ-13
		Fire	SS-18-18
		Fire protection	OP-21-15

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Firm energy or capacity	RP-14-11	Flexiplace policy and procedure	PE-31
First Responders	SS-18-18	Flexischedule	FI-18-11
Fiscal and accounting practices, legal interpretations of	LW-28-17	Flexitime documentation	FI-18-11
Fish and wildlife	FW	Flexitime policy and procedure	PE-31
Fish and Wildlife Credits	FI-31	Flight logs	TT-14-13
Fish and wildlife facilities	FW-24	Floods	ED-19-13
Fish and wildlife projects	FW-25	Floods/flood control	RP-22-13
Fish and Wildlife Service	EQ-22	Flow data	OP-30-11
Fish and Wildlife Service	EQ-23	FMFIA	MN-17
Fish and wildlife, legal issues about	LW-23	FMIS	FI-26
Fish and wildlife, streamflow for	FW-32	FMIS A-127	FI-26-13
Fish Capital Investments	PA-12-17	FMIS accounts payable	FI-26-11
Fish Capital Investments	PA-12-17	FMIS change control	FI-26-17
Fish census	FW-39	FMIS changes, control of	FI-26-17
Fish harvest	FW-24	FMIS changes, requests for	FI-26-12
Fish passage	PA-14-12	FMIS objectives and standards	FI-26-13
Fish passage and survival analysis	FW-29	FOIA	EX-13-13
Fish passage at dams	FW-29	FONSI	EQ-13
Fish physiology	FW-24	Forecast comparisons	RP-30
Fish predator management	FW-39	Forecast comparisons, internal	RP-30-13
Fish quality	FW-24	Forecast comparisons, Northwest Power Planning Council	RP-30-11
Fish reprogramming and acclimation	FW-25	Forecast comparisons, PNWUCC	RP-30-12
Fish reservoir mortality	FW-29	Forecast, NWPPC	RP-30-11
Fish stock assessments	FW-39	Forecasting, resource planning	RP
Fish survival at hydropower operations	FW-29	Forecasts, conservation issue	RP-32
Fish survival through reservoirs	FW-29	Forecasts, economic	RP-29
Fish transportation	FW-29	Forecasts, economic- demographic	RP-29-14
Fish, resident	FW-24	Forecasts, economic-fuel prices	RP-29-15
Fitness facility	PE-49	Forecasts, economic-national	RP-29-12
Fixed assets	FI-12-11	Forecasts, economic-regional	RP-29-13
Fixed wing aircraft	TT-14-11	Forecasts, exchange	FI-27
FLAR and other monitoring systems	OP-25	Forecasts, load, for rate development	PM-15-11
FLAR features	OP-25-22	Forecasts, outyear	PM-15-12
Flatbook, Congressional	BU-11-19	Forecasts, published load	RP-28
Flatbook, OMB	BU-11-18	Forecasts, rate	PM-15
Fleet management	TT-13-11	Forecasts, revenue	PM-15-13
		Forecasts, short term	RP-34-11
		Foreign travel	TT-17
		Foreign visits & assignments	SS-18-11

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Form 1099, IRS	FI-16-11	General Accounting Office, audits by	MN-17-13
Form W-3	FI-19-20	General Counsel's dealings with public and private groups	LW-16
Form W-4	FI-19-12	General Inquiries	EX-13-12
Forms management	SS-13	General ledger reports	FI-11-11
Forms, agency	SS-13	General ledger, PACS	FI-26-15
Forms, completed	Recurring code 3	General power rates development	LW-28-15
Foundations, facility	ED-15-25	General shops service request	SS-19
FPMR	TT	General transmission rates development	LW-28-16
Freedom of Information Act	EX-13-13	General vouchering	FI-26-11
Freight bills	TT-12-11	Generation and load databooks	OP-30-11
Freight rates	TT-12-16	Generation equipment	RP-21-23
Freight, transportation of	TT-12	Generation Integration/Load Integration (Industry Restructuring)	RE-21
Frequencies, radio	IR-16	Generation profiles	OP-20-14
Frequency and time synchronization	OP-23	Generation projects	RP-24
Frequency management, microwave	ED-20-12	Generation resources	OP-18
Front end reconfiguration, RODS	OP-26-21	Generator dropping	ED-21-18
FTE planning	BU-11-16	Geographic information system	ED-27
FTE staffing	BU-11-16	Geomagnetic-induced current monitoring	OP-25-23
FTS	IR-16	Geotechnical concerns	ED-15-25
Fuel consumption, vehicle	TT-15	Geothermal resources	RP-21-11
Fuel inventory report	TT-15-13	GIC	OP-25-23
Fuel logs	TT-15-11	GIS	ED-27
Fuel utilization	TT-15-11	GIS	OP-18-15
Functional appraisals, environmental	EQ-17-12	Goals, long range	MN-15
Functional statements	MN-12	GOES	OP-25-21
Function-by-function review	MN-18	Governance (Industry Restructuring)	RE-25
Funding requests, public	EX-12-13	Government affairs, city	EX-15-14
Fund-raising	PE-33	Government affairs, federal	EX-15-12
Furniture disposal	SU-14-15	Government affairs, foreign	EX-15-11
Furniture maintenance	SU-16-13	Government affairs, state	EX-15-13
Furniture requests	SU-16	Government bill of lading	TT-12
FWS	EQ-22	Government officials	EX-15
FWS	EQ-23	Government transportation requests	TT-12-12
GAO, audits by	MN-17-13	Grade reduction	PE-42-14
Garnishment	FI-19-12	Graphic arts	EX-11-11
Gas insulated substation	OP-18-15		
Gauging stations	ED-17		
GBL	TT-12		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Graphic report	Recurring code 8	Health program	PE-46
Graphs	EX-11-11	Health records, individual	PE-46-11
Greenhouse gasses	EQ-25	Health reports	PE-46-15
Grievance, labor	PE-34-17	Health unit	PE-46-12
Grievances	LW-18	Hearing, rate	PM-16
Grievances and appeals, non- EEO	PE-43	Hearings, Congressional	EX-13-16
Grievances, non-EEO	PE-43	Hearings, OMB	BU-11-18
Grounding	ED-15-22	Heavy mobile equipment	TT-13
Grounds upkeep	SS-14	Helicopters	TT-14-12
Groundwire stringing	ED-15-28	Help desk function	IR-21
Groups, resource	PE-39-13	High-voltage substation equipment	ED-17-14
Growth migration behavior, fish	FW-24	Hispanic employment program	PE-36-11
GSA motorpool	TT-13-11	Hispanic heritage week	PE-36-12
GSA owned vehicles	TT-13-11	Historical tracking, financial	FI-29-11
GTRs	TT-12-12	History, BPA	EX-11-12
Guides	Recurring code 4, MA-17	Honorary events	EX-14
Guides, performance level	MA-16-13	Hot checks	ED-15-32
Halon systems	OP-21-15	Hot spot chart recordings	MA-11-12
Handbooks	MN-14	Hourly job evaluation	PE-29
Hardshell map basic data	LA-24-15	Hours of duty	PE-31
Hardshell maps	LA-24-14	Hours of work and leave	FI-18
Hardware, ADP	IR-15	Hours of work, records of	FI-18-11
Hardware, computer	IR-22	Household goods, shipment of	TT-12-11
Hardware, transmission line design	ED-15-14	Human factors design	OP-21-16
Harvest, fish	FW-24	HV line tests	OP-19
Hatcheries	FW-24	HVDC control systems	ED-24-16
Hazardous air pollutants	EQ-20-13	HVDC terminals	ED-17-13
Hazardous material, shipment of	TT-12-13	Hydro Benchmarking Studies	PA-11-15
Hazardous waste management	EQ-18	Hydro Generation Efficiency	PA-12-13
Hazardous waste manifests	EQ-18-14	Hydro Generation Efficiency	PA-12-13
Hazardous weather policy	PE-32	Hydro Generation Expansion	PA-12-14
Hazards of criticality	PE-53-17	Hydro Generation Expansion	PA-12-14
HazMat registration, DOT	EQ-18	Hydro Optimization	PA-12-12
Headwater/downstream determinations	RP-22-16	Hydro Optimization	PA-12-12
Health benefits	PE-47	Hydro Performance and Benchmarking	PA-11-15
Health insurance deductions	FI-19-22	Hydro System Performance	PA-11-14
		Hydro System Performance Measurement	PA-11-14
		Hydroelectric notices, FERC	RP-24
		Hydroelectric resources	RP-21-15

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Hydroelectric resources, secondary	RP-21-19	Information resources management plans	IR-12
Hydromet	OP-25-21	Information system, financial management	FI-26
Hydrometeorology, Canadian- related	RP-16-17	Information system, geographic	ED-27
ICB	SS-15-11	Information system, land (LIS)	LA-20
Icing	ED-19-13	Information system, payroll and personnel	FI-19-15
Identification numbers, EPA	EQ-18-11	Information systems planning	IR-12
Identification numbers, EPA	EQ-18	Initiation	Recurring code 7
Identification of wildlife losses	FW-39-12	Injury compensation	PE-44
Identification photographs	EX-11-11	Injury, personal	PE-53-11
IG audits	MN-17-18	Inquiries, general	EX-13-12
Illustrations	EX-11-11	Inspection and survey files	SS-18-11
Image classification	ED-28	Inspection Reports	SU-15-16
Image processing system	ED-28	Inspections, Department of Energy	SS-18-11
Images	EX-11-11	Inspections, factory	SU-15-13
Import/export customs	TT-12-15	Inspections, safety	PE-53-17
Improvement	Recurring code 7	Inspector General audits	MN-17-18
Improvement, maintenance	MA-16	Insulation coordination	ED-11-11
Incidents, vandalism/theft/and other	SS-18-15	Insulators	ED-15-16
Income analysis	RP-18	Insurance	LW-17
Income tax allowance, relocation	TT-18	Insurance deductions	FI-19-22
Income taxes	FI-19-20	Insurance policies	RK-12
Indian tribe contacts, American	EX-15-15	Insurance, employee	PE-47
Indoor air quality	EQ-25	Integrated resource planning	RP-13-11
Inductive coordination	ED-11-12	Intellectual property	LW-26-13
Industrial sector conservation	CN-15	Intelligence	SS-18-16
Industries	EX-15-17	Interagency relations	EX-15-12
Industry contacts	EX-15-17	Interchange flows vs. schedules	OP-22-16
Industry Restructuring	RE	Interchange logs	OP-13-11
Industry Restructuring Ancillary Services	RE-23	Interchange meters	OP-24
Industry Restructuring Issues (Seams)	RE-18	Interchange schedules	OP-13-11
Industry Restructuring Taxation	RE-28	Interchange, scheduled and actual	OP-30-11
Information collection budget	SS-15-11	Interconnect geographically	MA-19
Information management activities	IR	Interconnection agreements	TM-12
Information management systems, security of	IR-14	Interconnections, operation of	OP-13
Information resources	IR	Interest charges	FI-23
		Interest recovery	FI-28

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Interference, radio	ED-11-13	IRS form 1099	FI-16-11
Intern programs	PE-23	Issues, parking	SS-14-11
Internal audits, environmental	EQ-17-14	Issues, power plan	RP-11
Internal management, legal issues about	LW-17	Itineraries, visitor's	EX-13-15
Internal placement	PE-18	JCP	SS-16-12
Interruptible loads	OP-30-11	Job standards, hourly	PE-29-11
Interruption reports	OP-11-13	JOC	PA-11-19
Intertie and transmission services	LW-24-12	Joint Committee on Printing	SS-16-12
Intertie assured access, power transactions	PM-12-28	Joint operating and coordination agreements	OP-14
Intertie monitor, stability control	OP-16-16	Joint Operating Committees (JOC)	PA-11-19
Interties and interconnections, operation of	OP-13	Journal vouchers	FI-11
Interties, AC	ED-14-11	Jurisdictional rate case activities	FI-27
Interties, DC	ED-14-12	Key objectives	MN-15-11
Interties, design and construction	ED-14	Keys, accountability for keys issued	SS-18-11
Interties, RAS for	ED-24	kV tests, 110	OP-19-16
Interties, remedial action schemes for	ED-24	KWH	ED-17-16
Interutility data exchange	OP-21-18	KWH meters	OP-24-12
Intervals, maintenance	MA-16-13	Labor arbitration decisions	PE-34-16
Intervenor funding	EX-12-13	Labor arbitration, grievances and	PE-34-17
Intra-agency memorandum of agreement	MN-15	Labor unions	PE-34-15
Intra-agency memorandum of understanding	MN-15	Laboratory service request	ED-12-14
Inventories, descriptive	SS-15	Laboratory test reports	ED-12-14
Inventory management	SU-14-11	Labor-management relations	PE-34
Inventory reports	SS-15	Land	LA
Investigation	Recurring code 7	Land acquisition	LA-14
Investigation reports	FI-13-12	Land and land rights, disposal of	LA-16
Investment	FI-21-12	Land and sea vehicles	TT-13
Investments, fish and wildlife mitigation	FW-39	Land appraisal	LA-12
Invoices	FI-17	Land claims	LW-27-12
Involvement, public	EX-12	Land claims over \$500	LW-27-12
IPS	ED-28	Land claims under \$500	LW-27-12
IPS	OP-25	Land information system	LA-20
IR client support	IR-21	Land management	LA-17
Irrigation Issues	PA-16	Land policies with Federal agencies	LA-18
Irrigation Payments	PA-16	Land policies with state, local governments	LA-19
		Land rights, acquisition and management of	LW-27-11

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Land rights, legal issues about	LW-27	management	
Landslides	ED-15-25	Legal issues about WPPSS	LW-29
Law	LW	Legal questions about BPA's conservation programs, projects	LW-21-11
Laws, legal issues about	LW-15	Legislation, legal issues about	LW-15
Lease	SU-12	Legislative contacts	EX-15-12
Lease, building or land	SU-12	Length of service awards	PE-26-15
Lease, power transactions	PM-12-21	Letters	Recurring code 3
Leased equipment, maintenance and repair	SU-16-13	Liability and Risk Management (Industry Restructuring)	RE-20
Leased line lists	OP-26-14	Liaison	IR-20
Leave policy and procedure	PE-32	Library services	IR-25
Leave transfer program	PE-47-15	License Agreements	TM-13
Leave without pay, eligibility for	PE-32	License applications, FERC	RP-24
Leave without pay, extended	FI-18-11	Life insurance	PE-47
Leave, donated/transferred	PE-47-15	Lighting, airway	ED-15-20
Leave, recorded use of	FI-18-11	Lightning protection and grounding for transmission lines	ED-15-22
Ledger reports, general	FI-11-11	Lightning protection, environmental	ED-19-13
Ledger summary reports, detail	FI-11-11	Line crossings	ED-15-17
Ledger, entries to general	FI-17	Line drawings	ED-15-11
Ledger, PACS general	FI-26-15	Line loss schemes	OP-16-20
Ledger, plant record	FI-12-11	Lines, transmission	ED-15
Ledgers	FI-26-15	LIS	LA-20
Legal interpretations of fiscal and accounting practices	LW-28-17	List, mailing/distribution	SS-12-11
Legal issues about BPA ratemaking	LW-28	List, qualification	SU-15-17
Legal issues about conservation	LW-21	Listing and Recovery Plan, ESA Section 4	EQ-22
Legal issues about contracting	LW-26	Listings, directory	IR-16
Legal issues about environment	LW-22	Lists, leased line	OP-26-14
Legal issues about financial issues	LW-17	Litigation	LW-20
Legal issues about fish and wildlife	LW-23	Litigation issues, securities	FI-20-16
Legal issues about internal management	LW-17	Litigation, ASC	FI-27
Legal issues about land rights	LW-27	Litigation, WPPSS	LW-29-11
Legal issues about law and legislation	LW-15	L-lines	LA-24-11
Legal issues about personnel matters	LW-18	Load and Resource Forecasts	TM-35
Legal issues about power business line services	LW-24	Load curtailment	OP-20-16
Legal issues about resource	LW-25	Load data	ED-21-12
		Load databooks, and generation	OP-30-11
		Load following, AGC cost of service	OP-22-15

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Load Forecast Summary	RP-28	Loop flow curtailment procedures	OP-11-15
Load forecasts, commercial	RP-28	Loss assessments, wildlife	FW-39
Load forecasts, direct service industry	RP-28-16	Losses	RP-35
Load forecasts, industrial	RP-28-14	Lost opportunity resources	RP-17-13
Load forecasts, irrigation	RP-28-15	Low density discount	PM-14-20
Load forecasts, published	RP-28	Lower Snake/Grand Coulee line loss schemes	OP-16-20
Load forecasts, rate development	PM-15-11	LSR	ED-12-14
Load forecasts, residential	RP-28	LWOP, eligibility for	PE-32
Load frequency control	OP-22	LWOP, extended	FI-18-11
Load levels, equipment	OP-30	Machine shop request	SS-19
Load projections, customer	RP-26	Magnetic fields	ED-11-14
Load representation and modeling	ED-21-20	Mail services	SS-12
Load shed/load dropping, under-frequency	OP-16-11	Mail, certified	SS-12
Load studies	RP-23	Mail, express	SS-12
Load/resource balance	RP-23-14	Mailing/distribution lists	SS-12-11
Loadings, mechanical and meteorological	ED-15-29	Mainstem dams, fish passage at	FW-29
Loadings, temperature and electrical	ED-15-30	Maintenance and repair, office and substation equipment	SU-16-13
Loads	OP-20	Maintenance efficiency	MA-16
Loadshedding, under-voltage	OP-16-24	Maintenance equipment and material	MA-11-12
Loans, material and equipment	SU-14-11	Maintenance improvement	MA-16
Local councils	EX-15-19	Maintenance information	MA-17
Local governments, land policies with	LA-19	Maintenance instructions	MA-17
Lodging program, direct bill	TT-16	Maintenance intervals	MA-16-13
Log, central guard office master	SS-18-11	Maintenance of fish and wildlife facilities	FW-24
Log, controlled mail	SS-11-12	Maintenance of leased equipment	SU-16-13
Logs, credit hour	FI-18-11	Maintenance of power system	MA
Logs, dispatch	OP-11-11	Maintenance procedures	MA-17
Logs, flight	TT-14-13	Maintenance schedules	IR-19
Logs, fuel	TT-15-11	Maintenance standards	MA-17
Logs, interchange	OP-13-11	Maintenance trees	LA-15
Logs, long distance telephone	IR-16	Maintenance, communications equipment	MA-13-11
Logs, operation	OP-13-11	Maintenance, environmental procedures	EQ-12-11
Long distance telephone logs	IR-16	Maintenance, non-electric plant	SS-14
Long range goals	MN-15	Maintenance, preventive	MA-16-13
Long range incremental cost	PM-14-19	Maintenance, PSC	MA-13
Long-term operating system reliability plan	OP-31-11		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Maintenance, right-of-way	MA-12-11	Material disposal	SU-14-15
Maintenance, software	IR-18	Material requests	SU-14-11
Maintenance, substation	MA-11	Material specifications	ED-15-27
Maintenance, transmission line	MA-12	Material storage and disposal	SU-14
Management	MN	Material, substation maintenance	MA-11-12
Management analysis	MN-16	Materials management	SU-14
Management appraisals	MN-16	Maternity leave	PE-32
Management appraisals, environmental	EQ-17-11	MDL 551	FI-20-16
Management development	PE-24-18	Mechanical loadings	ED-15-29
Management evaluations	MN-16	Media contacts	EX-11-13
Management improvement studies	MN-16	Media relations	EX-11-13
Management techniques, automated database	IR-17	Media, various	EX-11-11
Management, database	IR-17	Medical records, employee	PE-46-13
Management, demand side	RP-33	Medical surveillance	PE-46-13
Management, disaster	SS-18-18	Medicare	PE-45
Management, facilities	SS-14	Meetings	Recurring code 6
Management, records	SS-15	Membership Requests	MN
Management, space	SS-14-12	Memoranda	Recurring code 3
Manifests, hazardous uniform waste	EQ-18-14	Memorandum of agreement, external	EX-15
Manifests, uniform hazardous waste	EQ-18-14	Memorandum of agreement, internal	MN-15
Manual accounting	FI-26	Memorandum of agreement, intra-agency	MN-15
Manuals	MN-14	Memorandum of understanding, external	EX-15
Manuscripts	LA-23	Memorandum of understanding, intra-agency	MN-15
Map, hardshell	ED-15-11	Merit promotion plan, BPA	PE-18-11
Mapping, computer assisted	LA-26	Meteorological loadings	ED-15-29
Mapping, survey and	LA-24	Meter check	OP-22-17
Mapping, topographic	LA-23-15	Meter slips	PM-11-17
Marginal cost analysis	PM-14-17	Meter, relay, and metering	OP-24
Market Monitoring/Price Mitigation (Industry Restructuring)	RE-11	Metering	OP-24
Marketing	RP-18-14	Metering, substation	ED-17-16
Marketing, conservation	CN-11	Meters, interchange & KWH	OP-24
Markings, obstruction	ED-15-20	Methodology, ASC	FI-27
Martin Luther King, Jr., holiday	PE-36-12	Methods, system analysis	ED-22
Material and equipment loans	SU-14-11	Microfilming	SS-16
Material and equipment, substation	MA-11-12	Microwave communication system	OP-26-14

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Microwave facilities – towers work	ED-32	MWTT	OP-28
Microwave monitor	OP-26-14	Named file	Recurring code 2
Microwave monitoring	OP-25	Narrative report	Recurring code 8
Microwave systems	ED-20-12	National ambient air quality standards	EQ-20-13
Microwave transfer trip/telephones	OP-28	National councils	EX-15-19
Mid-Columbia coordination	OP-22-20	National Marine Fisheries Service	EQ-22
Middle management development	PE-24-18	National Marine Fisheries Service	EQ-23
Military leave	PE-32	National pollutant discharge elimination system	EQ-20-11
Minority businesses	SU-13	National security information	SS-18-16
Minutes	Recurring code 6	Natural flow data	OP-30-11
Mitigation of fish and wildlife	FW-24	Near-Real Time Optimization	ES-02-18
MoA, external	EX-15	Negatives	EX-11-11
MoA, internal	MN-15	Negotiations, power contracts	PM-12-11
Mobile equipment	TT-13	NERC	RE-14
Mobilization readiness	PE-52	Net debt	FI-29-13
Model Conservation Standards	RP-32-11	Network maintenance	IR-19
Modeling, load representation	ED-21-20	New employee orientation	PE-24-18
Modulation, DC	ED-21-16	New employee probation	PE-19-11
Monetary awards	PE-26-17	New resources	RP-21-21
Monitor, control systems	OP-25-11	New Technologies	PA-14
Monitor, microwave	OP-26-14	News deadlines	EX-11-13
Monitor, power system disturbance	OP-25-16	News releases	EX-11-14
Monitor, sequence of events	OP-25-17	NFRAP-REVEST	PM-15-13
Monitoring systems	OP-25	NMFS	EQ-22
Monitoring, geomagnetic-induced current	OP-25-23	NMFS	EQ-23
Monthly power situation	RP-23-14	No stock office supply system	SU-16-15
Mortality of fish in reservoirs	FW-29	Noise complaints, helicopter	TT-14-12
Motor vehicle accidents	PE-53-13	Noise, audible	ED-11-13
Motorpool	TT-13-11	Non-BPA litigation	LW-20-12
MoU, external	EX-15	Non-disclosure agreements	EX-13-12
MoU, intra-agency	MN-15	Nonelectric plant maintenance	SS-14
Movement of goods and people	TT	Nonelectric plants	MA-11-12
Multi-District Litigation 551	FI-20-16	Non-Federal dams	OP-22-20
Multiyear program direction and plan	MN-15	Non-federal development at federal facilities	RP-20
Munro control center, AGC at	OP-22-22	Nonfederal units, land policies with	LA-19
MURS	BU-11-16		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Nonfirm revenue analysis program-revenue estimates	PM-15-13	Occupational safety program	PE-53
Nonmonetary awards	PE-26-18	Offeror	SU-12-11
Non-OPF personnel files	PE-11-13	Office automation and equipment technology	IR-15
Non-Treasury financing	FI-20	Office automation equipment	IR-15
Non-Treasury sources of credit	FI-20	Office equipment requests	SU-16
Nonwood poles	MA-12-13	Office equipment, numbered	SU-16-11
Northwest Federal Employees Association	PE-35	Office of workers compensation cases	PE-44-12
Northwest Power Act	LW-28-11	Office of workers compensation program	PE-44
Northwest Power Act	LW-28-12	Office systems equipment request	SU-16
Northwest Power Act	LW-28-14	Officer, operational contracting	SU-12-11
Northwest Power Planning Act	FW-24	Official passports	TT-11-11
Northwest Power Planning Council	EX-15-18	Official personnel folder	PE-11
Northwest Power Planning Council	FW-24	Official record, rate filings and hearings	PM-16-13
Northwest Power Planning Council (NWPPC)	RP-30-11	Official travel	TT-11
Northwest Power Pool tests	OP-19-19	Offset lithographic plates	EX-11-11
Notes, sale of bonds and	FI-21-12	Oil spill containment	EQ-20-11
Notices, FERC	RP-24	OMB budget	BU-11-18
Notification of personnel action	PE-16-11	OMB circular A-11, BPA response to	MN-18
NPDES	EQ-20-11	OMB circular A-127	FI-26-13
NRTO	ES-02/18	OMB Document Budget Appendix	BU-11-18
Nuclear insurance pools	RP-12	OMB passback	BU-11-18
Nuclear power projects	LW-29	On-site construction	MA-20
Numbered drawings	ED-15-11	On-the-job injury	PE-53-11
Numbered file	Recurring code 2	Open Access Same Time Information System (OASIS)	TM-24
Numbered office equipment	SU-16-11	Open Access Service Agreements	TM-15
Numbered publications	EX-11-15	Open loop operation	OP-16-15
NW Power Pool generation	OP-30-11	Operating bulletins	OP-32
NWPP tests	OP-19-19	Operating expenses	FI-28
NWPPC	RP-30-11	Operating personnel office, general	PE
NWPPC two-year action plan, BPA responses to	RP-12	Operating plan, reliability	OP-31-11
OASIS	TM-24	Operating systems	IR-20
Objectives	Recurring code 7	Operating the power system, legal issues about	LW-25
Objectives, program	MN-12		
Obligations	FI-11-11		
Obstruction markings	ED-15-20		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Operating year resources	BU-13	Outages, operation	OP-13-11
Operation and maintenance, power transactions	PM-12-17	Outgrants	LA-17-11
Operation of fish and wildlife facilities	FW-24	Outlays, cash and noncash	BU-13-15
Operation of non-BPA computer centers	IR-20-12	Outlays, obligations and	FI-11-11
Operation of the power system	OP	Outyear forecasts	PM-15-12
Operation, reliability of transmission system	OP-31	Overhead cost	FI-25
Operational contracting officer	SU-12-11	OWCP	PE-44, PE-44-11
Operational Emergencies, FCRPS	PA-13-14	OWCP cases	PE-44-12
Operations	OP	Ozone depletion	EQ-20-13
Operations (Industry Restructuring)	RT-14	PACE/PAC positions	PE-21-14
Operations accounting	FI-11-11	Pacific Intertie Stability Control Schemes	OP-16-14
Operations and Maintenance Agreements	TM-16	Pacific Northwest Power Act	BU-14-16
Operations and Maintenance Program, FCRPS	PA-13	Facility Asset Plan Development	PA-11-12
Operations information program	OP-30	Painting	SS-14
Operations Security	SS-18-21	Painting request	SS-19
Operations, computer	IR-19	Panels	Recurring code 6
Operations, environmental procedures	EQ-12-11	Paperwork Reduction Act	SS-15-11
OPF	PE-11	Parking	SS-14-11
OPM Form 71e	FI-18-11	Part-time	PE-31
OPSEC	SS-18-21	Passback, OMB budget	BU-11-18
Optics, fiber	ED-20-13	Passenger transportation	TT-12
Options	RP-20-15	Passports, official	TT-11-11
Organization, employee	PE-35	Patents	LW-26-13
Organizational charts	MN-11	Pathology, fish	FW-FW-24
Organizations, external	EX-15	Pay administration	PE-30
Oscillographs	OP-24-13	Pay retention	PE-42-14
Other-than-full-time employment	PE-17	PAY/PERS	FI-19-15
Other-than-traditional sources of funds	FI-20	Paying Agent (Industry Restructuring)	RE-26
Outage program, fast	OP-15-13	Payment for goods and services, accounting of	FI-11-11
Outages	OP-12	Payment methods, alternate	FI-17-11
Outages and Path Capacity	TM-37	Payment, timely processing of	FI-23
Outages, customer and transmission	OP-30	Payments	FI-17
		Payments, land	LA-13
		Payments, Purchase Card Receipts	FI-17-11
		Payroll and personnel system	FI-19-15
		Payroll operations	FI-19

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Payroll schedules	FI-19-18	Personnel files, administrative officers'/supervisors'	PE-11-13
PCB	EQ-18	Personnel files, non-OPF	PE-11-13
PCB capacitors	EQ-18	Personnel management, BPA	PE-13-12
PCS	TT-18	Personnel management, DOE	PE-13-11
PCS	TM-14	Personnel management, general	PE-13
PCS Agreements	TM-14	Personnel matters, legal issues about	LW-18
PD-57 tapes	PM-11-17	Personnel prototypes	PE-13
PDCI	TM-36	Personnel reporting requirements	PE-14
Peak load diversity factors	RP-36-12	Personnel research and demonstration project	PE-27
Peak load factors	RP-36-11	Personnel security clearances	SS-18-12
Peak load shapes	RP-36-13	Personnel tracking systems	PE-15
Peak loads	RP-36	Phasing checks	OP-19-13
Peaking studies	RP-23-12	PHDAS	OP-22-12
PEB	RP-16	Photocopying	SS-16
PEBCOM	RP-16	Photogrammetric work requests	LA-23-12
Penalty charges	FI-23	Photogrammetry	LA-23
Performance appraisals, non-SES	PE-25-14	Photographs and slides	EX-11-11
Performance appraisals, SES	PE-25-15	Photographs, aerial	LA-23-11
Performance level guides	MA-16-13	Photographs, identification	EX-11-11
Performance management	PE-25	Photomaps/photomosaics	LA-25
Performance, RODS	OP-26-15	Photomosaics	LA-23-12
Permanent change of station	TT-18	Physical security of automated systems	IR-14
Permanent Engineering Board	RP-16	Physical security of buildings, vehicles, and equipment	SS-18-11
Permanent Engineering Board Committee	RP-16	Physical security surveys	SS-18-11
Permits, environmental	EQ-20-13	Physiology, fish	FW-24
Permits, ESA Section 10	EQ-24	Pictures, still and motion	EX-11-11
Permits, land	LA	PL 95-521	PE-38
Personal Communications Systems (Contracts)	TM-14	Placement	PE-20
Personal injury	PE-53-11	Places of duty	PE-31
Personal injury and property damage	LW-19	Plan and profile hardshell maps	LA-24-14
Personal property accounting system procedures	FI-13-17	Plan and profile maps	ED-15-11
Personal property custodians	FI-13-14	Plan, affirmative employment	PE-36-16
Personal property loss, employee	PE-53-15	Plan, annual management	MN-15-11
Personal property loss, private party	PE-53-16	Plan, assured operating	RP-16-18
Personal property requisitions	SU-16-11	Plan, reliability operating	OP-31-11
Personnel	PE	Plan, security	SS-18
Personnel action, notification of	PE-16-11	Planned outages	OP-12-11

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Planning	Recurring code 7	Position classification standards	PE-28-12
Planning the power system, legal issues about	LW-25	Position descriptions	PE-28-14
Planning, accounting, and control system general ledger	FI-26-15	Position management	MN-12
Planning, coordinated	IR-12	Posters	EX-11-11
Planning, FTS	BU-11-16	Potential and New Resources	RP-21-21
Planning, information systems	IR-12	Potential Hydroelectric Power	RP-20-13
Planning, power system	ED-21	Potential resources	RP-21-21
Planning, space	SS-14-12	Power acquisition	PM
Planning, wildlife mitigation	FW-39-12	Power Assets	PA
Planning/Expansion (Industry Restructuring)	RE-16	Power Business Line, legal issues about	LW-24
Plans, control centers' contingency	OP-21-17	Power cables	ED-15-19
Plans, strategic	MN-15	Power circuit breakers	ED-17-14
Plant accounting	FI-12	Power flow program, BPA- WSSC	ED-22-11
Plant construction cost records	FI-12-12	Power flow, system requirements for	OP-15-12
Plant data, Canadian	RP-16-16	Power marketing	PM
Plant mortality data	FI-12-11	Power plan issues	RP-11
Plant mortality data	FI-12-13	Power Planning Council requirements, BPA responses to	PM-13-11
Plant record ledgers	FI-12-11	Power project evaluations and analysis	RP-24
Plants, nonelectric	MA-11-12	Power purchases	BU-14-19
PLGs	MA-16-13	Power sales, power transactions	PM-12-11
Plumbing request	SS-19	Power services	LW-24-11
Pluralism council	PE-39-13	Power supply, uninterruptible	OP-21-14
Point-on-tangent lists	LA-24-11	Power system construction	MA-20
Poles, nonwood	MA-12-13	Power system control	MA-13
Poles, wood	MA-12-12	Power system disturbance monitor	OP-25-16
Policies	Recurring code 4	Power system maintenance	MA
Policies, land, with Federal agencies	LA-18	Power system planning	ED-21
Policies, land, with state and local governments	LA-19	Power transactions	PM-12
Policy, repayment	FI-29	Power transactions, cogeneration	PM-12-22
Policy, RODS software	OP-26-16	Power transactions, conservation	PM-12-25
Political activity of federal employees	PE-37	Power transactions, construction	PM-12-29
Pollutants	EQ-20-13	Power transactions, emergency	PM-12-30
Pollution prevention	EQ-18	Power transactions, exchange	PM-12-13
Position classification	PE-28	Power transactions, exchange transmission	PM-12-14
		Power transactions, inertia	PM-12-28

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
assured access		Press clippings	EX-11-17
Power transactions, lease	PM-12-21	Press, radio, and TV releases	EX-11-14
Power transactions, operation and maintenance	PM-12-17	Prevent voltage collapse, Puget Sound	OP-20-20
Power transactions, other	PM-12-23	Preventive maintenance	MA-16-13
Power transactions, power sales	PM-12-11	Pricing (Industry Restructuirng)	RE-15
Power transactions, purchase	PM-12-26	Primary resource sites and potentials	RP-13-12
Power transactions, residential exchange	PM-12-27	Print demand tapes	PM-11-17
Power transactions, residential purchase and exchange	PM-12-24	Printing, reproduction	SS-16
Power transactions, service and exchange	PM-12-15	Priority placement program	PE-20-11
Power transactions, storage	PM-12-12	Private party claims for property loss	PE-53-16
Power transactions, transfer	PM-12-19	Private property, damage to	LW-27-12
Power transactions, transmission	PM-12-18	Private utility contacts	EX-15-16
Power transactions, trust/customer service reimbursable	PM-12-16	Probation, employment	PE-19
Power transactions, voltage regulator	PM-12-20	Probation, new employee	PE-19-11
Power transmission system operations	OP	Probation, new supervisor/manager	PE-19-12
Powerhouse data acquisition system, AGC	OP-22-12	Procedures	Recurring code 4
Powerhouse response test	OP-25-19	Procedures, access	IR-20
Practices, engineering	ED-11	Procedures, environmental	EQ-12-11
Pre-construction assistance program	RP-17-15	Procedures, loop flow curtailment	OP-11-15
Predator management, fish and wildlife	FW-34	Procedures, PSC alarm and evacuation	OP-21-15
Pre-initial proposal	PM-13-12	Procedures, RODS software	OP-26-16
Preliminary lines and topography surveys	LA-24-12	Procedures, standard operating	IR-19
Preliminary material to work orders	ED-13-11	Processing personnel actions	PE-16
Preliminary transmission tower siting studies	LA-24-13	Procurement matters	LW-26-11
Preparation	Recurring code 7	Procurement, actions	SU-12
Preparedness, emergency management and	SS-18-18	Procurement, Commercial	SU-12
Presidential management interns	PE-23	Procurement, Non-commercial	SU-12
		Production facilities, fish	FW-24
		Productivity	MN-18
		Products, audiovisual	EX-11-11
		Professional Engineers in Government	PE-35
		Profile levels	LA-24-12
		Profile maps	LA-24-14
		Profile maps, plan and	ED-15-11
		Profiles, station and generation	OP-20-14

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Program and reporting analyses	BU-13-18	Property Management Regulations, Federal	TT
Program appraisals/development	MN-12	Property relief certificates	FI-13-11
Program Savings Estimates	RP-32-12	Property, intellectual	LW-26-13
Program, apprenticeship	PE-24-19	Proposal, pre-initial	PM-13-12
Program, Columbia Basin fish and wildlife	FW-24	Proposals, unsolicited	SU-12-11
Program, copier management	SS-16-11	Proposals, unsuccessful	SU-12-11
Program, correspondence management	SS-11	Protection of buildings	SS-18-11
Program, Efficiencies	PC	Protection of documents	SS-18-14
Program, records management	SS-15	Protection of fish	FW-24
Program, resource	RP-13	Protection, fire	OP-21-15
Program, vital records	SS-15-12	Protection, lightning	ED-15-22
Programs, computer	IR-18	Protective relaying	ED-20-11
Project Completions	ED-13	PSC maintenance	MA-13
Project Coordination	PC	PSDM	OP-25
Project Coordination (Efficiencies Program)	PC	Public and private groups, General Counsel's dealings with	LW-16
Project data	ED-13-11	Public groups	EX-15-20
Project diagrams, control	ED-17	Public information	EX-13
Project estimates	ED-13	Public involvement	EX-12
Project estimates, land	LA-11-12	Public involvement issues about environmental quality	LW-22-16
Project evaluations, WNP	RP-24	Public involvement reading room	EX-13-14
Project, competitiveness	MN-18	Public involvement requests	EX-12-13
Project-related environmental legal issues	LW-22-17	Public involvement working committees	EX-12-13
Projects, Efficiency Program	PC-11	Public law 95-521	PE-38
Projects, Efficiency Program	PC-11	Public record, official	EX-12
Projects, Efficiency Program Communications	PC-11-11	Public understanding requests	EX-12-13
Projects, fish and wildlife	FW-25	Public utility district contacts	EX-15-16
Projects, generation	RP-24	Publications, BPA-numbered	EX-11-15
Promotion	PE-18	Publications, ordering of	IR-25
Promotion, apprenticeship and craftsman	PE-18-11	PUD contacts	EX-15-16
Promotions, temporary	PE-18-16	Puget Sound voltage stability	OP-20-20
Prompt Payment Act	FI-17	Puget Sound voltage stability control scheme	OP-16-23
Property accounting	FI-13	Pumped storage	RP-22-12
Property control	FI-13	Purchase card receipts	FI-17-11
Property custodians	FI-13-13	Purchase card receipts	FI-17-11
Property damage, personal injury and	LW-19	Purchase orders	SU-12
Property management policies	SU-14	Purchase, power transactions	PM-12-26
		QuakEx	SS-18-18

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Qualification requirements	PE-22	Real-Time Transmission Scheduling	TM-26
Quality assurance	SU-15	Reasonable Accommodations	PE-57
Quality assurance program manuals	SU-15-14	Reassignments, intra- and inter-agency	PE-18-15
Quality Assurance Program Manuals	SU-15-14	Receiving reports	SU-16-12
Quality, air	EQ-25	Reception and representation fund	BU-13-16
Quality, environmental	EQ	Recommendations, acquisition	IR-15
Quantification of wildlife losses	FW-39-12	Reconfiguration, RODS front end	OP-26-21
Quarterly Reviews, Budget	BU-13	Record of decision	EQ-14
R&D, New Technologies	PA-14	Record of decision	FI-27
Radio frequencies	IR-16	Record/register cards	PE-21-19
Radio interference	ED-11-13	Recordings, audio and video	EX-11-11
Radio stations	ED-17	Recordings, dispatcher's	OP-11-12
Radio, press, and TV releases	EX-11-14	Recordings, top oil and hot spot	MA-11-12
Rail cars	TT-12-13	Records disposition	SS-15
Rail, truck, ship report	TT-12-17	Records holding reports	SS-15
Rain, acid	EQ-20-13	Records management	SS-15
RAM	PM-14-12	Records schedules	SS-15
RAS	ED-24	Records, counseling	PE-36-15
Rate analysis	PM-14	Records, financial disclosure	PE-38
Rate analysis model	PM-14-12	Recovery Plan, ESA Section 4	EQ-22
Rate database	PM-14-11	Recovery, disaster	SS-18-18
Rate filings and hearing record	PM-16-13	Recruitment and examining	PE-21
Rate filings and hearings	PM-16	Recruitment, selection, placement	PE-20
Rate forecasts	PM-15	Red book	CN-11
Rate hearings	LW-28-11	Reductions in force	PE-42-12
Rate, wholesale	PM-13-13	Regional Council (Northwest Power Planning Council)	EX-15-18
Ratemaking goals and practices	LW-28-17	Regional Transmission Organization	RE
Ratemaking repayment	LW-28-17	Registers, examining system	PE-21-17
Ratemaking, legal issues about	LW-28	Regulations	Recurring code 4
Rates development, transmission	LW-28-16	Regulations, Federal travel	TT
Rates development, wholesale	LW-28-15	Regulatory actions, miscellaneous environmental	EQ-20
Rates, courts' review of	LW-28-13	Reimbursables	BU-14-19
Rates, freight	TT-12-16	Rejected proposals, public involvement	EX-12-13
RCRA	EQ-18-11	Relay	OP-24
RD&D	ED-12		
Reactive compensator, static volt-ampere	ED-17-17		
Real-time load sheets	TM-26		
Real-time operation dispatch and scheduling system	OP-26		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Relaying, protective	ED-20-11	Reports, inventory	SS-15
Relaying, single-pole	ED-21-19	Reports, Joint Committee on Printing	SS-16-12
Relaying, system protection	OP-29	Reports, Laboratory test	ED-12-14
Release of land or land rights	LA-16	Reports, receiving	SU-16-12
Reliability	OP-31	Reports, records holding	SS-15
Reliability criteria	ED-23	Reports, SCADA	OP-27
Reliability Investment for Hydro Generation	PA-12-15	Reports, security officer	SS-18-11
Reliability Investments for Hydro Generation	PA-12-15	Reproduction and printing	SS-16
Reliability operating plan	OP-31-11	Reproduction requests	SS-16
Reliability plan, operating system	OP-31-11	Reprogramming of fish	FW-24
Reliability, report on RODS	OP-26-15	Request, general shops service	SS-19
Relocation income tax allowances	TT-18	Request, laboratory service	ED-12-14
Relocations	TT-18	Requests, furniture	SU-16
Remedial action scheme, operation of	OP-16	Requests, office equipment	SU-16
Remedial action schemes, development of	ED-24	Requests, photogrammetric work	LA-23-12
Remote and central time transmission	OP-23	Requests, reproduction	SS-16
Remote synchronization scheme	OP-17-11	Requests, sensitive information	EX-13-12
Remote terminal units, SCADA	OP-27-15	Requests, tools and work equipment	SU-14-13
Repair of government-owned vehicles	TT-13-13	Requirements, financial disclosure	PE-38
Repair, maintenance and	SU-16-13	Requirements, fiscal	BU-14
Repair, office and substation equipment	SU-16-13	Requirements, human	BU-14
Repayment	FI-29	Requirements, program	BU-14
Repayment, ratemaking	LW-28-17	Requirements, resource	BU-14
Repeater stations	ED-17	Requirements, revenue	FI-28
Replacements, FCRPS	FI-29-12	Requisitions	SU-12
Report on availability and reliability, RODS	OP-26-15	Requisitions, personal property	SU-16-11
Report, entity	RP-16-21	Rescue teams	SS-18-18
Report, fuel inventory	TT-15-13	Research and demonstration project, personnel	PE-27
Reporting, 1099	FI-16-11	Research and development	ED-12
Reporting, EEO	PE-36-16	Research and Development, new technologies	PA-14
Reports	Recurring code 8	Research, Development & Demo. – Hydro	PA-14
Reports, board of survey	FI-13-12	Reserve fund	FI-20-17
		Reserve, AGC interim spinning	OP-22-11
		Reservoir mortality for fish	FW-29
		Reservoir passage of fish	FW-29
		Resident fish	FW-24

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Residential exchange, power transactions	PM-12-27	Resource strategy	RP-13
Residential purchase and exchange, power transactions	PM-12-24	Resources, biomass	RP-21-16
Residential purchase and sale agreement	FI-27	Resources, capacity	RP-21
Residential sector conservation	CN-16	Resources, cogeneration	RP-21-17
Resource acquisition contractual issues	LW-26-12	Resources, conservation	RP-21-20
Resource acquisition, legal issues about	LW-25	Resources, electrical	ED-21-13
Resource acquisitions, planning for	RP-17	Resources, energy	RP-21
Resource Conservation and Recovery Act	EQ-18-11	Resources, geothermal	RP-21-11
Resource groups	PE-39-13	Resources, hydroelectric	RP-21-15
Resource management, legal issues about	LW-25	Resources, lost opportunity	RP-17-13
Resource planning and forecasting	RP	Resources, new	RP-21-21
Resource planning, integrated	RP-13-11	Resources, potential	RP-21-21
Resource program proposal responses	RP-13-14	Resources, secondary hydroelectric	RP-21-19
Resource program, annual	RP-13	Resources, generation	OP-18
Resource requirements, administrative	BU-14-14	Resources, solar	RP-21-13
Resource requirements, ADP equipment	BU-14-11	Resources, thermal/fossil	RP-21-12
Resource requirements, ADP software	BU-14-11	Resources, water	RP-22
Resource requirements, capital equipment	BU-14-11	Resources, wind	RP-21-14
Resource requirements, fish and wildlife	BU-14-13	Responders, first	SS-18-18
Resource requirements, general and executive	BU-14-14	Responses to Power Planning Council requirements	PM-13-11
Resource requirements, office equipment	BU-14-11	Responses to resource program proposals	RP-13-14
Resource requirements, Planning Council	BU-14-16	Restoration, system	OP-17
Resource requirements, reimbursable	BU-14-19	Retail industrial market	PM-14-22
		Retirement system	PE-45
		Retirements	FI-19-21
		Return registered, mail	SS-12
		Revenue and receipts	FI-23
		Revenue forecasts	PM-15-13
		Revenue metering systems	OP-24-11
		Revenue requirements	FI-28
		Revenue requirements	LW-28-17
		Review, average system cost	LW-28-14
		Review, function-by-function	MN-18
		Reviews	Recurring code 5
		Reviews, ADP-related technical	IR-13
		Reviews, Budget (Quarterly)	BU-13
		Reviews, environmental	EQ-16
		RIF	PE-42-12

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Right to know act, emergency community	EQ-18-13	Salmonids	FW- 31
Right-of-way	LA-22	SARA	EQ-17
Right-of-way clearing study	LA-23-16	SARA	EQ-20
Right-of-way maintenance	MA-12-11	Savings bond drive	PE-33
Right-of-way maintenance photomaps	LA-25	Savings bonds	FI-19-13
Right-of-way permits and clearing	LA-22	SBO-7	PE-39-13
Rights and interests	SS-15-12	SCA	PM-17-18
Risk management	RK-13	SCADA	ED-17-15
RITs	TT-18	SCADA	OP-27
RMS	ED-17-16	SCADA backup	OP-27-18
RMS	OP-24-11	SCADA CRTs	OP-26-22
Roads, location and design of access	ED-15-24	SCADA voltage control actions	OP-25-18
Roads, maintenance of access	MA-12-11	SCADA, Dittmer	OP-27-20
ROD	EQ-23	Scheduled interchange	OP-30-11
ROD	FI-27	Schedulers' load logs	TM-26
RODS	OP-26	Schedules and charts, rate filings and hearings	PM-16-11
RODS and SCADA CRTs	OP-26-22	Schedules of station and generation profiles	OP-20-14
Roofing	SS-14	Schedules, fee	IR-20-12
Ross closure, dangerous waste areas	EQ-18	Schedules, interchange	OP-13-11
Ross stock catalog	SU-14-13	Schedules, maintenance	IR-19
Rosters	Recurring code 6	Schedules, payroll	FI-19-18
Rotary account database, RODS	OP-26-17	Schedules, records	SS-15
Route requirements, telemetry alternate	OP-22-19	Schedules, Treasury	FI-16
RPA	BU-11-15	Scheduling Coordinator (Industry Restructuring)	RE-13
RPSA	FI-27	Scheduling practices	OP-14
RTUs	OP-27-15	Schematic drawings, as-constructed	ED-18-13
Rules	Recurring code 4	Scheme, Bellingham area load trip	OP-16-22
Safe drinking water act	EQ-20-12	Scheme, Colstrip integration control	OP-16-21
Safe driving awards	PE-53-14	Scheme, dead bus clearing	OP-17-12
Safety inspections	PE-53-17	Scheme, remedial action	OP-16
Safety management	PE-53-17	Scheme, remote synchronization	OP-17-11
Safety program, occupational	PE-53	Scheme, special protection	OP-16
Sale of BPA bonds	FI-21-12	Schemes, Boundary and BC Hydro	OP-16-18
Sale of BPA notes	FI-21-12	Schemes, line loss	OP-16-20
Sales, power	PM-12-11	Schemes, remedial action	ED-24

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Schemes, stability control	OP-16	SER	ED-17-15
SCIM	OP-16-16	SER (System Equipment Records)	SU-14-11
SCIM	OP-25	Series capacitor tests	OP-19-18
Screen paper prints	EX-11-11	Series subcodes, GS	PE-28-13
Sea vehicles, land and	TT-13	Service and exchange, power transactions	PM-12-15
Seams Steering Group Western Interconnection	RT-11	Service contracts	SU-15-15
Seawater tolerance of fish	FW-24	Service request, laboratory	ED-12-14
Section 10 Permits, ESA	EQ-24	Services, library	IR-25
Section 4, ESA	EQ-22	Services, mail	SS-12
Section 7, ESA	EQ-23	Services, supply	SU
Securities litigation issues	FI-20-16	Services, support	SS
Security	SS-18	Settlement of land claims	LW-27-12
Security Alarm System	SS-18-11	Sheet metal work request	SS-19
Security and Protective Services Administration	SS-18-11	Shipment of hazardous material	TT-12-13
Security application programs	OP-15	Short term forecasts	RP-34-11
Security clearances, personnel	SS-18-12	Short term forecasts, coordination agreement	RP-34-14
Security information, national	SS-18-16	Short term forecasts, direct service industries	RP-34-11
Security of ADP	IR-14	Short term forecasts, generating publics	RP-34-12
Security of automated systems, physical	IR-14	Short term forecasts, nongenerating publics	RP-34-13
Security of buildings/vehicles/and equipment, physical	SS-18-11	Shortage report	TT-12
Security of data files	IR-14	Short-term contract management	TM-34
Security officer reports	SS-18-11	Shunt capacitors	ED-17-14
Security plans	SS-18	Sick leave	PE-32
Security, automated systems	IR-14	Sign-in/sign-out sheets	FI-18-11
Security, computer	SS-18-13	Single-pole relaying	ED-21-19
Security, information management systems	IR-14	Site storage capabilities	RP-22-14
Security, software	OP-21-13	Slice	PM-17
Seismic design and mitigation work	ED-30	Slice True-Up	PM-17-13
Selection	PE-20	Slides, earthquakes and	ED-19-14
SEMM/SUDS/SER	OP-25	SM&T	ED-17-16
Sensitive information requests	EX-13-12	Small businesses	SU-13
Separate accounting	FI-29-11	Small resources program	RP-17-12
Separate accounting	LW-28-17	Smoking cessation	PE-49
Sequence of events monitor/recorder	OP-25-17	Soaking	OP-19-13
Sequential automatic switching	OP-27-17	Social Security	PE-45
		Social Security taxes	FI-19-20

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Society of Concerned Engineers	PE-35	Staffing	BU-11-16
Socioeconomic programs	SU-13	Staffing levels and cost controls	MN-12
Software applications	IR-22	Standard operating procedures, ADP	IR-19
Software development and maintenance	IR-18	Standards	Recurring code 4
Software security	OP-21-13	Standards and procedures, environmental	EQ-12-11
Software, RODS	OP-26-16	Standards of conduct	PE-39
Solar resources	RP-21-13	Standards of conduct (SOC) issues	TM-24
Sole source aquifer program	EQ-20-12	Standards, engineering	ED-11
Solicitations	SU-12-11	Standards, national ambient air quality	EQ-20-13
SORs	SS-18-11	Standby power, emergency	OP-21-14
Source data, billing	PM-11-17	Standing orders, dispatcher	OP-11-14
Sources of credit, non-Treasury	FI-20	Startup tests	OP-19-15
Sources of funds, alternative	FI-20	State and local environmental matters	LW-22-14
Sources of funds, other-than traditional	FI-20	State government affairs	EX-15-13
Southern Idaho control	OP-27-19	State governments, land policies with	LA-19
Space management	SS-14-12	State ground water standards	EQ-20-12
Spare transformers	OP-20-15	Statements, environmental impact	EQ-14
SPC	MA-14	Static volt-ampere reactive compensator	ED-17-17
SPC equipment	MA-14-11	Station and generation profiles	OP-20-14
SPCC	ED-19-12	Station design	ED-17-12
Special events	EX-14	Station drawings	ED-17-11
Special leave	FI-19-12	Stations	ED-17
Special protection scheme	OP-16	Stations, gauging	ED-17
Specifications, construction	ED-15-26	Stations, radio	ED-17
Specifications, material	ED-15-27	Stations, repeater	ED-17
Speeches	EX-11-16	Statistical information	PE-36-16
SPIFs	MA-17	Statistical report	Recurring code 8
Spill for fish	FW-29	Status applicant file	PE-18-14
Spill prevention control	ED-19-12	Status reinstatement	PE-17
Spokane (Munro) control center, AGC at	OP-22-22	Steelhead production	FW-24
Sponsorships, public	EX-12-13	Stereoplotter systems, analytical	LA-23-13
SRS	ED-12-14	Stock catalog, Ross	SU-14-13
SSGWI	RT-11	Storage requests, Canadian-	RP-16-15
Stability control intertie monitor	OP-16-16		
Stability control scheme, Puget Sound	OP-16-23		
Stability control schemes	OP-16		
Stability, transient	ED-22-12		
Stability, WILSWA voltage	OP-20-21		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
related		Substations, design and construction support	ED-17
Storage tanks, underground	EQ-18-11	Substations, operation of	OP-18
Storage, power transactions	PM-12-12	Suggestions, employee	PE-26-13
Strategic business order	PE-39-13	Suitability for employment	PE-20-14
Strategic choices/planning	MN-15	Sum of utilities	RP-38
Strategy, FCRPS	PA-11-11	Summaries, card key	SS-18-11
Strategy, resource	RP-13	Summary of Economic Forecasts	RP-29-11
Streambank erosion	ED-15-25	Superfund	EQ-18-13
Streamflow	RP-22-15	Superfund Amendments and Reauthorization Act	EQ-17
Streamflow depletion	RP-22-11	Superfund Amendments and Reauthorization Act	EQ-20
Streamflows for fish and wildlife	FW-32	Supervisory control and data acquisition system	OP-27
Stringing, conductor and groundwire	ED-15-28	Supplier Evaluation	SU-15-17
Structural Engineering, Analysis and Design	ED-32	Supplies and equipment	SU-16
Structures and foundations, substation	ED-30	Supply curves	RP-13-13
Structures and towers	ED-15-15	Supply services	SU
Structures and Towers	ED-15-15	Supply system bond refinancing	FI-20-19
Student employment	PE-17	Support services	SS
Studies, AOP hydroelectric	RP-16-19	Supporting survey records	LA-24-15
Studies, direction-of-effort	FI-25	Surveillance photographs	EX-11-11
Studies, load	RP-23	Surveillance, factory	SU-15-13
Studies, peaking	RP-23-12	Surveillance, medical	PE-46-13
Studies, preliminary transmission tower siting	LA-24-13	Survey adjustment records	LA-24-11
Studies, workload	FI-25	Survey and inspection files	SS-18-11
Study	Recurring code 7	Survey and mapping	LA-24
Study, right-of-way clearing	LA-23-16	Survey data	LA-24
Substation data systems	ED-17-15	Survey, photogrammetry	LA-23
Substation electrical wiring and schematic drawings	ED-18-13	Surveys, control	LA-24-11
Substation equipment maintenance	SU-16-13	Surveys, physical security	SS-18-11
Substation maintenance	MA-11	Surveys, topography	LA-24-12
Substation metering and telemetering	ED-17-16	Surveys, tower site	LA-24-13
Substation Structures and Foundations	ED-30	Survival of fish, reservoirs	FW-29
Substation, customer service	OP-18	SVC systems	ED-17-17
Substation, gas insulated	OP-18-15	Switches, design of transmission disconnect	ED-15-33
Substations work, drawings	ED-15-11	Switching tests	OP-19-12
		Switching, capacitor	ED-21-14
		Switching, sequential automatic	OP-27-17
		Symposia	EX-12-11

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Synchronization, remote	OP-17-11	Systems, control	ED-24
Synchronization, system time	OP-23-11	Systems, cost recovery (ADP-related)	IR-12
Synchronization, time and frequency	OP-23	Systems, halon	OP-21-15
System analysis methods	ED-22	Systems, HVDC control	ED-24-16
System construction	ED-18	Systems, microwave	ED-20-12
System electrical data books	ED-25	Systems, monitoring	OP-25
System equipment records	SU-14-11	Systems, revenue metering	OP-24-11
System loads	OP-30-11	Systems, substation data	ED-17-15
System maintenance, power	MA	Systems, SVC	ED-17-17
System planning, power	ED-21	T&A reporting	FI-18
System protection control	MA-14	Tanks, underground storage	EQ-18-11
System protection relaying	OP-29	Tap changers	OP-20-15
System reliability criteria	ED-23	Tariff (Industry Restructuring)	RE-22
System restoration	OP-17	Task forces	Recurring code 6
System restoration tests	OP-17-13	Tax allowance, relocation	TT-18
System tests	ED-12-15	Taxation (Industry Restructuring)	RE28
System time synchronization	OP-23-11	Taxes	FI-19-20
System transformers	OP-20-15	Taxes	LW-17
System, ADP resource management reporting	FI-26-16	TCDS	OP-27-14
System, geographic information	ED-27	TCMS	TM-12-13
System, image processing	ED-28	TDY travel	TT-16
System, land information	LA-20	Team, transformation	MN-18
System, microwave communication	OP-26-14	Teams, rescue	SS-18-18
System, payroll and personnel	FI-19-15	Teams, vertical	MA-16-12
System, personal property account	FI-13-17	Technical Reports	ED-12-13
System, planning, accounting, and control	FI-26-15	Technical reviews, ADP-related	IR-13
System, real-time operation dispatch and scheduling	OP-26	Technology, equipment	IR-15
System, reliability of operation of transmission	OP-31	Telecommunications	IR-16
System, supervisory control and data acquisition	OP-27	Telecommunications equipment maintenance	IR-19
System, transmission control and dispatch	OP-27-14	Telecommuting	PE-17
System, Walker accounts payable and purchase order	FI-26-11	Telecommuting	PE-31
Systems planning, information	IR-12	Telemetry, substation	ED-17-16
Systems security, automated	IR-14	Telemetry	ED-17-16
		Telemetry alternate route requirements	OP-22-19
		Telephone logs, long distance	IR-16
		Telephone service, commercial	IR-16
		Teletype	IR-16

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Television presentations	EX-11-11	TLM equipment and materials	MA-12-14
Telex	IR-16	TLM poles, nonwood	MA-12-13
Temperature loadings	ED-15-30	TLM poles, wood	MA-12-12
Temporary duty travel	TT-16	Tools and work equipment	SU-14
Temporary promotions	PE-18-16	Top oil chart recordings	MA-11-12
Temporary/term employment	PE-17	Topographic mapping	LA-23-15
Terminals, HVDC	ED-17-13	Tort claims	LW-19-11
Terminated contracts	TM-12-14	Tour arrangements	EX-13-15
Terrain	ED-19-14	Tower site surveys	LA-24-13
Terrorism	SS-18-18	Towers, structures and	ED-15-15
Test data	ED-18-11	Toxic Substance Control Act	EQ-18-12
Test energization procedures	OP-19-13	Tracing sheets	TT-12-17
Test reports, laboratory	ED-12-14	Trademarks	LW-26-13
Test reports, manufacturers'	SU-15-14	Trainee programs	PE-24-19
Test, powerhouse response	OP-25-19	Training aids	PE-24-21
Testimony, BPA formal	EX-13-16	Training certificates	PE-24
Tests, 110-kV	OP-19-16	Training, apprentice and craftsman	PE-18-11
Tests, candidate	PE-21-15	Training, audiovisuals	EX-11-11
Tests, energized equipment	OP-19	Training, BPA-sponsored	PE-24-19
Tests, energized transmission system	ED-12-15	Training, general	PE-24
Tests, factory	SU-15-13	Training, other-than-BPA- sponsored	PE-24-20
Tests, fast power change	OP-19-14	Training, vendor in equipment operation & maintenance	IR-19
Tests, fault	OP-19-11	Transactions, financial	FI-11
Tests, HV line	OP-19	Transfer to other agency	PE-18
Tests, laboratory	ED-12-14	Transfer, leave	PE-47-15
Tests, new equipment performance	OP-19-11	Transfer, power transactions	PM-12-19
Tests, Northwest Power Pool	OP-19-19	Transfers, intra- and inter-agency	PE-18-15
Tests, series capacitor	OP-19-18	Transformation team	MN-18
Tests, startup	OP-19-15	Transformer tests	OP-19-13
Tests, switching	OP-19-12	Transformers and other high- voltage equipment	ED-17-14
Tests, system	ED-12-15	Transformers, operation of	OP-20-15
Tests, system restoration	OP-17-13	Transient stability	ED-22-12
Tests, transformer	OP-19-13	Transit certificates	TT-12
Theft and other incidents	SS-18-15	Transmission Billing	TM-18
Thermal/fossil resources	RP-21-12	Transmission Billing Back-up	TM-18-12
Third-party debt instruments	FI-20-18	Transmission Billing Source Data	TM-18-11
Time and attendance reporting	FI-18	Transmission Contract	TM-12-13
Time books	FI-18-11		
Timely processing	FI-23		
Title and payment, land	LA-13		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Management System (TCMS)		services	
Transmission Contract Transactions	TM-12	Transmission, voice recordings	TM-38
Transmission Contracts	TM-12-13	Transportation of freight	TT-12
Transmission control and dispatch system	OP-27-14	Transportation requests	TT-11
Transmission design	ED-15-13	Transportation requests	TT-12-12
Transmission disconnect switches, design of	ED-15-33	Transportation, fish	FW-29
Transmission facilities, environmental issues	ED-19	Travel and transportation	TT
Transmission Line Design	ED-15-13	Travel authorizations	TT-11
Transmission line maintenance	MA-12	Travel vouchers	TT-11
Transmission line, acquiring	LA-14	Travel, domestic	TT-16
Transmission lines	ED-15	Travel, foreign	TT-17
Transmission Load Forecasting	TM-23	Treasury borrowing	FI-21-12
Transmission Marketing	TM	Treasury repayment	LW-28-17
Transmission Marketing Relations	TM-11	Treasury schedules	FI-16
Transmission Operating Agreement (Industry Restructuring)	RE-24	Treaties with Canada	LW-25-11
Transmission Pre-Scheduling	TM-27	Trees, danger	LA-15
Transmission Rate Case	TM-22	Trees, maintenance	LA-15
Transmission rates development	LW-28-16	Tribal relations, American Indian	EX-15-15
Transmission Revenue Analysis	TM-20	Trucking of fish	FW-29
Transmission Revenue Forecasting	TM-19	Trust Funds	FI-30
Transmission Risk Management	TM-21	Trust/customer service reimbursable	PM-12-16
Transmission schedulers' load logs	TM-26	TSCA	EQ-18-12
Transmission Scheduling System	PC-16	TTC (Total Transfer Capability)	TM-24
Transmission services, legal issues about	LW-30	Turbine Passage	PA-14-12
Transmission Support	PA-15-11	Turbine Passage	PA-14-12
Transmission system data, customer	ED-21-11	TV, press, and radio releases	EX-11-14
Transmission system operations	OP	Types, equipment	IR-15
Transmission system reliability	OP-31	U.S. Customs	TT-12-15
Transmission System work	ED-15	U.S. projects, Canadian-related	RP-16-12
Transmission, electronic	IR-16	U.S. savings bonds	FI-19-13
Transmission, power transactions	PM-12-18	U.S. Treasury, BPA's debt to	FI-29-13
Transmission, products and	TM-12-13	U.S. Treasury, dealings with	FI-21
		U.S. Treasury, sale of notes and bonds to	FI-21-12
		Unacceptable performance actions	PE-42-11
		Under-frequency load shed/load dropping	OP-16-11
		Underground injection control program	EQ-20-12
		Underground power cables	ED-15-19

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Underground storage tanks	EQ-18-11	Vertical teams	MA-16-12
Understanding, intra-agency memorandum of	MN-15	Veteran's employment preference	PE-17
Understanding, memorandum of	EX-15	Veteran's readjustment appointments	PE-17
Under-voltage loadshedding	OP-16-24	Video recordings	EX-11-11
Unemployment benefits	PE-47	VISA credit card	FI-17-11
Uniform hazardous waste manifests	EQ-18-14	Visible arcs	OP-19-12
Uniform waste manifests	EQ-18-14	Visitor control files	SS-18-11
Uninsured risks	RK-13	Visitor logs	EX-13-15
Uninterruptible power supply	OP-21-14	Visitors	EX-13-15
Unions, labor	PE-34-15	Vital records program	SS-15-12
Unsafe conditions	PE-53-17	Voice Recordings	PM-18
Unsolicited proposals	SU-12-11	Voltage	OP-20
Unsolicited Proposals (Power)	RP-24-11	Voltage and temperature charts	MA-11-12
USPS samples	SS-12	Voltage charts	OP-20-19
UST	EQ-18-11	Voltage control	OP-15-11
Utility contacts	EX-15-16	Voltage monitoring program	OP-25-18
Utility sector conservation	CN-17	Voltage regulator, power transactions	PM-12-20
Utility/customer basic data	RP-26	Voltage stability, Puget Sound	OP-20-20
Utility/customer basic data, agricultural/irrigation	RP-26-15	Voltage stability, WILSWA	OP-20-21
Utility/customer basic data, utilities	RP-26-11	Voluntary deduction authorizations	FI-19-12
Utilization data	RP-27	Voluntary reductions in force	PE-41
Utilization data, commercial	RP-27-12	Voluntary separations	PE-41
Utilization data, diversity factors	RP-27-15	Volunteers	PE-17
Utilization data, domestic	RP-27-11	Vouchering, general	FI-26-11
Value of Power Products	PA-11-16	Vouchers	FI-17
Vandalism and other incidents	SS-18-15	Vouchers, journal	FI-11
VAR compensation	ED-17-17	Vouchers, travel	TT-11
Vegetation management	MA-12-11	VRA	PE-17
Vehicle assignments, BPA	TT-13-12	W-3, form	FI-19-20
Vehicle assignments, GSA	TT-13-11	W-4, form	FI-19-12
Vehicle fuel consumption	TT-15	Walker accounts payable and purchase order system	FI-26-11
Vehicles, land and sea	TT-13	Warden program	SS-18-18
Vendor inspection and test plans	SU-15-14	Washington Nuclear Power Project evaluations	RP-24
Vendor training in equipment operation & maintenance	IR-19	Washington Nuclear Projects, rate analysis of	PM-14-23
Vendors, Qualification and Certification List	SU-15-17	Washington Public Power Supply System	FI-20-16
VerTeams	MA-16-12		

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KEYWORD	RECORD SERIES (FILE CODE)	KEYWORD	RECORD SERIES (FILE CODE)
Washington Public Power Supply System	FI-20-17	WNP project evaluations	RP-24
Washington Public Power Supply System	FI-20-18	Woman-owned businesses	SU-13
Washington Public Power Supply System	FI-20-19	Women's program, federal	PE-36-11
Washington Public Power Supply System	LW-29	Wood poles	MA-12-12
Waste minimization	EQ-18	Word processing equipment	IR-16
Wastes, dangerous	EQ-18	Work flow	MN-12
Water budget	FW-32	Work orders	ED-13
Water quality standards	EQ-20-11	Work orders, background material to	ED-13-11
Water resources	RP-22	Work requests, photogrammetric	LA-23-12
Water wells	ED-15-25	Work Standards	MA-17
Water-use efficiency	OP-22-20	Working committees, public involvement	EX-12-13
Weather	ED-19-13	Work-in-progress costs	FI-12-12
Weather adjustments	RP-37	Workload studies	FI-25
WECC	OP-16	WPPSS litigation	LW-29-11
WECC Compliance	PA-15-11	WPPSS, legal issues about	LW-29
WECC power flow	ED-22-11	Year 2000 (Y2K)	IR-26
WECC transient stability	ED-22-12	Youth employment	PE-17
Welding request	SS-19		
Wellhead protection program	EQ-20-12		
Wells, water	ED-15-25		
White book	RP-23-14		
Wholesale power rate	PM-13-13		
Wholesale power rate proposals	LW-28-15		
Wildlife	FW-39		
Wildlife mitigation	FW-39		
Wildlife mitigation planning	FW-39-12		
Wildlife, fish and	FW		
Wildlife, identification and quantification of losses	FW-39-12		
Willamette Valley voltage stability	OP-20-21		
WILSWA voltage stability	OP-20-21		
Wind	ED-19-13		
Wind resources	RP-21-14		
Wire transfer	FI-21-11		
Wireless agreements	TM-14		
Wireless Antenna work	ED-15		
WNP	LW-29		

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810 FILE GUIDE AND RETENTION SCHEDULE: BUDGET

Last Revision Date: March 18, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
BU	<p>Budget</p> <p>Material relating to the development, presentation and approval of BPA's yearly budget, analyses of funding and resources issues, administration and oversight of funding allocations and use of fiscal and human resources. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
BU-11	<p>BPA Budget Formulation</p> <p>Material relating to the development of BPA's planning year, budget year and outyear budgets. See also BU-13, Operating Year Resources.</p> <p><i>Retention Schedule: GRS-5/1</i> <i>Retain for 2 years and then destroy.</i></p>	FB
BU-11-15a	<p>BPA Budget and RPAs - Call Memos</p> <p>(a) The BPA Budget Instructions (call memos) that guide the formulation of the BPA Budget.</p> <p><i>Retention Schedule: N1-305-07-1-5/d</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	FB
BU-11-15b	<p>BPA Budget and RPAs - Budget Review Meetings</p> <p>(b) Material relating to the preparation, analysis, presentation and approval of BPA's budget, budget review meetings and documentation of budget decisions.</p> <p><i>Retention Schedule: GRS-5/2</i> <i>Retain for 1 years and then destroy.</i> <i>Destroy 1 year after the close of the fiscal year covered by the budget.</i></p>	FB
BU-11-15c	<p>BPA Budget and RPAs - Requests for Program/Project Authorizations</p> <p>(c) Requests for Program/Project Authorization (RPAs) are documents that communicate proposed programs/projects or significant changes in previously approved programs/projects for management approval.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	FB

810 FILE GUIDE AND RETENTION SCHEDULE: BUDGET

Last Revision Date: March 18, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
BU-11-15d	<p>BPA Budget and RPAs - Printouts from Budget Formulation System (BFS)</p> <p>(d) Printouts from Budget Formulation System (BFS). BFS is the database that collects the official version of the BPA budget.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	FB
BU-11-16a	<p>FTE Planning - Internal BPA Formulation of Program/Org Levels</p> <p>(a) Material relating to requisite internal BPA formulation of program and organizational levels of FTE numbers and narrative justifications.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon the completion of BPA's budget planning, formulation, execution and post-execution analysis period.</i></p>	NHI
BU-11-16b	<p>FTE Planning - Approval of FTE Proposals</p> <p>(b) Documentation of preparation, analysis and approval of FTE proposals. Includes lead program officer's responses to budget formulation or DOE requests for FTE data and/or justification narratives.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon the completion of BPA's budget planning, formulation, execution and post-execution analysis period.</i></p>	NHI
BU-11-16c	<p>FTE Planning - Incoming DOE Requests and BPA Responses</p> <p>(c) Incoming DOE requests and BPA responses to satisfy staffing level dated requirements.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain while Active + 1 years, and then destroy.</i> <i>Active period ends upon the completion of BPA's budget planning, formulation, execution and post-execution analysis period.</i></p>	NHI

810 FILE GUIDE AND RETENTION SCHEDULE: BUDGET

Last Revision Date: March 18, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
BU-11-18a	<p>OMB Budget - OMB Budget Instructions</p> <p>(a) The OMB Budget Instructions, OMB Budget document, the OMB Budget Document Appendix (formerly 'Flatbook'), passback and appeals document.</p> <p><i>Retention Schedule: N1-305-07-1-5/d</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i> VITAL RECORD</p>	FB
BU-11-18b	<p>OMB Budget - Presentation of BPA's Budget to the OMB</p> <p>(b) Material relating to the preparation and presentation of BPA's budget for formal documentation to the OMB, the OMB hearings and the OMB passback and appeals.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i> VITAL RECORD</p>	FB
BU-11-19a	<p>Congressional Budget - Congressional Budget Instructions</p> <p>(a) The Congressional Budget Instructions, Congressional Budget documents, the Congressional Budget Appendix (formerly 'Flatbook') and Appropriation Subcommittee reports.</p> <p><i>Retention Schedule: N1-305-07-1-5/d</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i> VITAL RECORD</p>	FB
BU-11-19b	<p>Congressional Budget - Congressional Budget Instructions</p> <p>(b) Material relating to the preparation and presentation of BPA's budget for formal documentation to the Congress, the Congressional hearings and Congressional report language.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i> VITAL RECORD</p>	FB

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Last Revision Date: March 18, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
BU-13	<p>Operating Year Resources</p> <p>Material relating to the administration and oversight of BPA's operating year budget, allocations and the monitoring and analysis of the use of fiscal and human resources.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i> VITAL RECORD</p>	FB
BU-13-11	<p>OMB Apportionment</p> <p>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.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 5 years and then destroy.</i> VITAL RECORD</p>	FB
BU-13-13	<p>BPA Allocations</p> <p>Material relating to allocations issued to BPA managers (formerly Assistant Administrators and Area Managers), authorizing them to incur obligations for their programs.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 5 years and then destroy.</i></p>	FB
BU-13-14	<p>Operating Year Plans</p> <p>Operating Year Plans 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. Also SOY revenue forecasts.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	FB
BU-13-15	<p>Outlays</p> <p>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.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	FB

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
BU-13-16	<p>Reception and Representation Fund</p> <p>Material relating to expenses authorized under this fund expressly for and by BPA's Administrator.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	FBB
BU-13-17	<p>Capital Analyses</p> <p>Material relating to BPA's programs which include a capital component. Includes memos, responses to special requests about capital projects. Does not include apportionment material, but may include material relating to apportionment's for capital.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	FB
BU-13-18	<p>Program and Reporting Analyses</p> <p>Special analyses performed for programs pertaining to operating year results. Includes memos, letters, graphics and charts in response to special, one-time requests.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	FB
BU-14	<p>Program Resource Requirements</p> <p>Material relating to the fiscal and human resource requirements and related issues for accomplishing and maintaining BPA's programs.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	FB
BU-14-11	<p>Capital Equipment Resource Requirements</p> <p>Material relating to resource requirements for and related issues on purchase of capitalized equipment that supports all BPA programs. Includes automated data processing/information resources (ADP/IR) general purpose equipment costing \$3,000 and greater, office furniture and equipment and all BPA-developed ADP/IR application software of \$100,000 and greater capitalizable nature.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	FB

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
BU-14-13	<p>Fish and Wildlife Resource Requirements</p> <p>Material relating to resource requirements for and related issues on protection, mitigation, and enhancement of fish and wildlife affected by hydroelectric facilities on the Columbia River and its tributaries, in accordance with the Pacific Northwest Power Act.</p> <p><i>Retention Schedule: N1-305-07-1-12/b</i> <i>Retain for 5 years and then destroy.</i></p>	FB
BU-14-14	<p>General and Administrative Resource Requirements</p> <p>Material relating to resource requirements for and related issues on BPA's executive management, financial control, regulatory compliance, accounting and administrative services.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	FB
BU-14-16	<p>Planning Council Resource Requirements</p> <p>Material relating to resource requirements for and related issues on activities of the Pacific Northwest Electric Power and Conservation Planning Council required by the Pacific Northwest Power Act.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	FB
BU-14-19	<p>Reimbursable Resource Requirements</p> <p>Material relating to resource requirements for and issues related to reimbursable power purchases, reimbursable services such as construction, operation and maintenance of transmission facilities and related utility, general support for customers and other entities.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 3 years and then destroy.</i></p>	TF, TFC, TFD, TFE, TFK, TFL, TFN, TFO, TFP, TFR, TFS, TFV, TFW

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Last Revision Date: May 28, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
CN	<p>Conservation</p> <p>Material relating to the development, implementation and management of energy conservation programs and activities. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
CN-11	<p>Conservation Marketing</p> <p>Material relating to marketing studies, research and firms' qualifications. Includes BPA's Red Book. See also FI-11-12, Conservation Accounting and SU-12, Routine Procurement Files.</p> <p><i>Retention Schedule: N1-305-07-1-13/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	KLH,KLJ,KLJB
CN-12	<p>Conservation Programs</p> <p>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. See also FI-11-12, Conservation Accounting and SU-12, Routine Procurement Files.</p> <p><i>Retention Schedule: N1-305-07-1-13/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	KL,KLH,KLJ, KLJC
CN-13	<p>Agricultural Sector</p> <p>Activities, evaluations and strategies general to all or several conservation issues or programs in the agricultural area. Includes lost opportunities.</p> <p><i>Retention Schedule: N1-305-07-1-13/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon termination of grants, agreements and/or contracts.</i></p>	KLH,KLJ,KLJB, KLJC,KLJD, KLK
CN-14	<p>Commercial Sector</p> <p>Activities, evaluations and strategies general to all or several conservation issues or programs in the commercial area. Includes lost opportunities.</p> <p><i>Retention Schedule: N1-305-07-1-13/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon termination of grants, agreements and/or contracts.</i></p>	KLH,KLJ,KLJB, KLJC,KLJD, KLK

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
CN-15	<p>Industrial Sector</p> <p>Activities, evaluations and strategies general to all or several conservation issues or programs in the industrial area. Includes lost opportunities.</p> <p><i>Retention Schedule: N1-305-07-1-13/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon termination of grants, agreements and/or contracts.</i></p>	<p>KLH,KLJ,KLJB, KLJC,KLJD, KLK</p>
CN-16	<p>Residential Sector</p> <p>Activities, evaluations and strategies general to all or several conservation issues or programs in the residential area. Includes lost opportunities.</p> <p><i>Retention Schedule: N1-305-07-1-13/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon termination of grants, agreements and/or contracts.</i></p>	<p>KLH,KLJ,KLJB, KLJC,KLJD, KLK</p>
CN-17	<p>Utility Sector</p> <p>Activities, evaluation and strategies general to all or several issues or programs relating to conservation in electrical utility distribution systems. Includes lost opportunities.</p> <p><i>Retention Schedule: N1-305-07-1-13/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon termination of grants, agreements and/or contracts.</i></p>	<p>KLH,KLJ,KLJB, KLJC,KLJD, KLK</p>
CN-18	<p>Federal Sector</p> <p>Activities, evaluation and strategies general to all or several issues or programs relating to conservation in electrical utility distribution systems. Includes lost opportunities.</p> <p><i>Retention Schedule: N1-305-07-1-13/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon termination of grants, agreements and/or contracts.</i></p>	<p>KLH,KLJ,KLJB, KLJC,KLJD, KLK</p>

810 FILE GUIDE AND RETENTION SCHEDULE: ENGINEERING, DESIGN, AND CONSTRUCTION

Last Revision Date: July 16, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED	<p>Engineering, Design, And Construction</p> <p>Material relating to the planning, design and construction support of the power transmission system. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
ED-11	<p>Engineering Standards and Practices</p> <p>Material relating to authorized engineering standards and practices used in the design and construction support of transmission facilities. To include transmission line standards, substation and NEP standards, and control protection and telecommunication standards.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon the sale or decommissioning of the property or equipment.</i></p>	<p>TEC,TECC,TECR TECS,TEL,TELC TELD,TELF TELM,TELP TELS,TESD TESF,TESM,TPS</p>
ED-11-11	<p>Insulation Coordination</p> <p>Material relating to the practice of correlating the insulating strength of engineering equipment with expected over-voltages and with the characteristics of protective devices.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i></p>	<p>TEL,TELC TELM,TESM</p>
ED-11-12	<p>Inductive Coordination and Interference</p> <p>Material relating to the placement, design, construction support, operation and maintenance of BPA facilities in conformity with harmoniously adjusted methods that will prevent inductive interference.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i></p>	<p>TEL,TELC TELM,TESM,TET TETC</p>
ED-11-13	<p>Audible Noise and Radio Interference</p> <p>Material relating to audible noise and radio interference from BPA facilities.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i></p>	<p>TEC,TECC,TECM TECP,TECR TECT,TEL,TELC TELM,TESM TET,TETC</p>

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-11-14	<p>Electrical Effects</p> <p>Material relating to electric and magnetic fields from BPA facilities. a) Transmission System work. b) Fiber Optics work.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i></p>	TEL,TELC TELM,
ED-12	<p>Research, Development and Demonstration</p> <p>Material relating to research, development and demonstration projects and authorities. a) Transmission System work. b) Fiber Optics work. c) Wireless Antenna work. d) Substations work. e) Control and Protection.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TECC,TECR,T ECS,TEL,TELC TELD,TESE TESM,TELM
ED-12-12	<p>Advisory and Exchange Committees</p> <p>Material relating to meetings and exchange of information with other local, national and international research and development groups or committees.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TEL,TELC,TESE D,TESE,TESM, TELD,TELE,TE LM,TELE,TEPP
ED-12-13	<p>Technical Reports</p> <p>Final technical reports as a result of research and development projects. See also EX-11-15, Publications. a) Transmission System work. b) Fiber Optics work. c) Wireless Antenna work.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TEL,TELC,TELE TELD,TELE TELE,TELM TELE,TESE
ED-12-14	<p>Laboratory Test Reports</p> <p>Material relating to workload generated by Laboratory Service Request (LSR) system (part of Service Request System, (SRS)). Includes tests and investigations of BPA's power system facilities and final test reports. See also ED-18-11, Test Data and OP-19-11, Fault Tests. a) Transmission System work. b) Fiber Optics work. c) Wireless Antenna work. d) Substations work. e) Laboratories and Field Services.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TEC,TECC TECM,TECP TECR,TECS TECT,TELE

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-12-15	<p>System Tests</p> <p>Material relating to staged system tests conducted on the energized transmission system. See also OP-19, Tests.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends when the equipment is removed from inventory, due to retirement or if the equipment is no longer maintained by BPA.</i></p>	TESM, TET TETC
ED-13	<p>Work Orders</p> <p>Material relating to project estimates. Also includes project completions.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends when project is completed or closed.</i></p>	TPW
ED-13-11	<p>Project Data</p> <p>Background material to ED-13, Work Orders. Includes, but not limited to, preliminary material not included in Work Orders, working notes and annotated copies of Work Order documents, project requirements diagram and other correspondence.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends when project is completed or closed.</i></p>	TPW
ED-13-12	<p>Master Lease Agreements</p> <p>Material relating to project Work Orders under the Master Lease Agreements. Also includes project Work Order completions. These lease agreements bind BPA and another party to terms, payment schedules, and details of the transmission projects.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends when Master Lease Agreement has expired. (Approximately 30 years.)</i></p>	TPW

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-14	<p>Interties and Interconnections</p> <p>Material relating to the planning, design and construction support of transmission lines serving to interconnect geographically distinct systems. See also ED-15, Transmission Lines, MA-19, Construction Interties and OP-13, Operation of Interties and Interconnections.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	KSC,TEP,TET,TPM,TPP,TSE
ED-14-11	<p>AC Interties</p> <p>Material relating to alternating current (AC) intertie facilities. See also ED-15, Transmission Lines.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TPP,TPM
ED-14-12	<p>DC Interties</p> <p>Material relating to the direct current (DC) intertie facilities. See also ED-15, Transmission Lines.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TEP,TPP,TPM
ED-15	<p>Transmission Lines</p> <p>Material relating to the planning, design and construction support of transmission lines. See also MA-12, Transmission Line Maintenance. a) Transmission System work. b) Fiber Optics work. c) Wireless Antenna work. d) Engineering support to land use permits.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TEL,TELC,TELD TELF,TELM, TELP,TELS TET
ED-15-11	<p>Drawings</p> <p>All BPA numbered and non BPA numbered drawings showing the design and construction support of transmission lines and structures. a) Transmission System work. b) Fiber Optics work. c) Wireless Antenna work. d) Substations work. Drawings are managed by Central Records.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends at dismantlement or disposal of facility, equipment, system or process.</i> VITAL RECORD</p>	TEL,TELC,TELD TELF,TELM, TELP,TERG TERM,TESD,TESF

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-15-12	<p>Construction Data Books</p> <p>Reduced-size drawings, site data, stringing data and instructions and similar construction specifications in book form. See also MA-12, Transmission Line Maintenance. a) Construction Data books for transmission lines. b) Fiber Optics work.</p> <p><i>Retention Schedule: N1-305-07-1-11/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	TEL,TELM TELP,TELS,TET
ED-15-13	<p>Transmission Line Design</p> <p>Material relating to the general design and construction support of transmission lines. a) Transmission System work. b) Fiber Optics work. c) Substation work.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TEL,TELC TELM,TELP
ED-15-14	<p>Conductors, Hardware and Accessories</p> <p>Material relating to accessories, re-conductoring, operating temperature and general design of conductors used on transmission lines. a) Transmission System work. b) Fiber Optics work.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TEL,TELC TELM
ED-15-15	<p>Structures and Towers</p> <p>Material relating to design and construction support of transmission line structures and towers including wood, steel and other footings. See also MA-12-12, Wood Poles and MA-12-13, Non-Wood Poles. a) Transmission System work. b) Fiber Optics application, design, construction of fiber optic cable attachments and associated towers. c) Wireless Antenna work.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TEL,TELD TELM,TESF
ED-15-16	<p>Insulators</p> <p>Material relating to types of insulators used in the design and construction support of transmission lines.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TEL,TELC TELM,TESD

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ED-15-17	<p>Line Crossings</p> <p>Material relating to crossings such as roads, bridges and culverts in the construction support of transmission lines.</p> <p><i>Retention Schedule: N1-305-07-1-11/e/1</i> <i>Retain while Active + 30 years, and then destroy.</i></p>	<p>TEL,TELC,TELD TELM,TELP</p>
ED-15-19	<p>Underground Power Cables</p> <p>Material relating to types of underground power cables, including submarine, used in construction support of transmission lines.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	<p>TEL,TELC,TELM TELP,TESD</p>
ED-15-20	<p>Airway Lighting and Obstruction Markings</p> <p>Material relating to the lighting and marking of transmission lines. a) Transmission System work. b) Fiber Optics application, design, construction of fiber optic cable attachments and associated towers.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	<p>TEL,TELC TELM,TELP</p>
ED-15-22	<p>Grounding and Lightning Protection</p> <p>Material relating to the generic design and application of grounding and/or lightning protection on transmission lines and substations. a) Transmission System work. b) Substations work.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i></p>	<p>TEL,TELC,TELM TESD,TESM, TET,TETD</p>
ED-15-23	<p>Corrosion</p> <p>Material relating to the investigation and mitigation of corrosion problems on the BPA system.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i></p>	<p>TEL,TELC,TELD TELM,TESD</p>

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ED-15-24	<p>Access Roads</p> <p>Material relating to the location and design of roads and related items for the construction support of new transmission lines and the maintenance of existing lines.</p> <p><i>Retention Schedule: N1-305-07-1-11/e/1</i> <i>Retain while Active + 30 years, and then destroy.</i></p>	TEL, TESF
ED-15-25	<p>Geotechnical</p> <p>Material relating to the investigation, evaluation, design and inspection of facility foundations, landslides, streambank erosion, water wells and other related geotechnical concerns. Includes committee work with ASCE, IEEE and EPRI to establish geotechnical industry standards.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TESF
ED-15-26	<p>Construction Specifications</p> <p>Material relating to industry standards and specifications and transmission engineering standard construction specifications. See also MA-19, Construction Interties and MA-20-11, Construction Fiber Optics. a) Transmission System work. b) Fiber Optics application and design of fiber optic cable attachments and associated towers. c) Substations work.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TESD, TESF, TET TETC, TETD, TELS
ED-15-27	<p>Material Specifications and Evaluation</p> <p>Material relating to the development of material specifications for use on transmission line items. a) Transmission System work. b) Fiber Optics application, design, construction of fiber optic cable attachments and associated towers. c) Substations work.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TEL, TELC, TELM TELP, TELS, TESD, TESF
ED-15-28	<p>Stringing Instructions</p> <p>Material consisting of conductor and groundwire stringing and installation data and instructions which are not included in construction data books. a) Transmission System work. b) Fiber Optics work.</p> <p><i>Retention Schedule: N1-305-07-1-11/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	TEL, TELC, TELM TELS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-15-29	<p>Line Loadings</p> <p>Material relating to the mechanical and meteorological loadings on transmission lines. a) Transmission System work. b) Fiber Optics work. c) Substations work.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TEL,TELC,TELD TELM,TESD
ED-15-30	<p>Line Ratings</p> <p>Material relating to operating temperature and electrical loading of transmission lines.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i></p>	TEL,TELC
ED-15-31	<p>Conductor Clearance</p> <p>Material relating to mechanical and electrical clearances between conductors or groundwires and other conductors, groundwires and ground structures. a) Transmission System work. b) Fiber Optics work. c) Substations work.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TEL,TELC,TELM TELP,TESD, TESM
ED-15-32	<p>Electrical Clearance Analysis</p> <p>Material relating to the analysis process which checks a transmission line for spans having less than the required ground clearance ('hot checks'). a) Transmission System work. b) Fiber Optics work.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	TEL,TELC,TELM
ED-15-33	<p>Switches</p> <p>Manufacturers design criteria and drawings, photographs, specifications and design drawings related to new and existing transmission disconnect switches.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TEL,TELM,TELP TESD,TESF, TESM

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-17	<p>Stations</p> <p>Material relating to the planning, design and construction support of stations, including substations, radio stations, gauging stations and repeater stations. Includes Control Project Diagrams. See also MA-11, Substation Maintenance.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TEP, TESD, TET TETC, TETD
ED-17-11	<p>Drawings</p> <p>All BPA numbered and non BPA numbered drawings showing the design and construction support of stations. a) Transmission System work. b) Fiber Optics work. c) Wireless Antenna work. d) Substations work. Drawings are managed by Central Records.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Retain for 5 years after dismantlement or disposal of facility, equipment, system or process.</i> VITAL RECORD</p>	TELF, TERG TERM, TESD TESF, TPM
ED-17-12	<p>Station Design</p> <p>Material relating to general design and construction support of stations. See also MA-11, Substation Maintenance.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TELF, TELS TESD, TEF, TET TETC, TETD
ED-17-13	<p>HVDC Terminals</p> <p>Material relating to the planning, design and construction of HVDC terminals.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i></p>	TEP, TESD, TESM TPP
ED-17-14	<p>High-Voltage Equipment</p> <p>Material relating to the engineering, design, specification and operation of high-voltage substation equipment. See also MA-11-12, Substation Equipment and Materials.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i></p>	TEP, TESD, TESM TET, TETD TPP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-17-15	<p>Substation Data Systems</p> <p>Material relating to substation data systems such as SER, SCADA and Annunciators.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	<p>TEC,TECC,TECM TECP,TECR TECT,TEP TET,TETC</p>
ED-17-16	<p>Substation Metering & Telemetry</p> <p>Material relating to SMamp, T such as RMS, KWH and AGC telemetry.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	<p>TET,TEC,TECC TECM,TECP TECR,TECS TECT</p>
ED-17-17	<p>Static Volt-Ampere Reactive Compensator</p> <p>Material relating to the engineering planning, design and construction of static volt-ampere reactive (VAR) compensation (SVC) systems. Includes memorandums, specifications, BPA service area coordination detailing, environmental and similar material. Does not include contract records.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends when equipment is removed from inventory due to retirement or if the equipment is no longer maintained by BPA.</i></p>	<p>TESD,TESM</p>
ED-18	<p>System Construction</p> <p>Material relating to the actual on-site construction of the power system. Includes daily progress reports, diaries, correction memos and similar documents. See also MA-20, Power System Construction.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	<p>TET</p>
ED-18-11	<p>Test Data</p> <p>Material relating to the testing of power systems prior to energization. See also ED-12-14, Laboratory Test Reports and OP-19-11, Fault Tests.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Destroy when related equipment or facility is disposed.</i></p>	<p>TET,TETC,TETD TETL</p>

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-18-12	<p>Energization</p> <p>Material relating to the energization of power systems.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Destroy when related equipment or facility is disposed.</i></p>	TET
ED-18-13	<p>As-Constructed Schematic Drawings</p> <p>Substation electrical wiring and schematic drawings which reflect the as-constructed configuration. See also ED-15-11, Drawings and ED-17-11, Drawings.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	TET,TESD
ED-19	<p>Engineering Environmental Considerations</p> <p>Material relating specifically to environmental considerations guiding the engineering, design and construction support of transmission facilities. See also EQ Chapter - Environmental Quality.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TEL,TELF,TELM TELP,TELS, TESD,TESF
ED-19-12	<p>Spill Prevention Control & Countermeasure</p> <p>Material relating to design and application of the spill prevention control and countermeasure (SPCC) system.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain for 5 years and then destroy.</i></p>	TELF,TESD TESF
ED-19-13	<p>Weather</p> <p>Material relating to the meteorological aspects of planning, design and construction support, including records relating to wind, icing, floods and lightning.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TEL,TELC

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-19-14	<p>Terrain</p> <p>Material relating to the planning, design and construction support of protection systems, including records about earthquakes and slides.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i></p>	TESF
ED-20	<p>Communication and Protection</p> <p>Material relating to communication equipment and restorative procedures on the BPA system.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TEC,TECC,TECM,TECP,TECR,TECS,TECT
ED-20-11	<p>Protective Relaying</p> <p>Material relating to protective relaying.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TECC,TECR,TECS
ED-20-12	<p>Microwave System</p> <p>Material relating to BPA microwave systems, including frequency management. See also IR-16, Telecommunications and OP-26-14, Microwave Communication System.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TEC,TECM,TECP,TECT
ED-20-13a	<p>Fiber Optics- Policy Documents</p> <p>Material relating to development and use of fiber optics technology throughout BPA's power system. Includes potential commercial applications. Often connected with BPA's microwave systems. Does not include experimental or unique technology. See also ED-12, Research, Development and Demonstration, ED-15, Transmission Lines ED-20-12, Microwave Systems and MA-20-11, Construction Fiber Optics. (a) Policy documentation. Includes information about changes and potential changes in BPA's communications systems and marketing surplus capacity.</p> <p><i>Retention Schedule: N1-305-07-1-11/e/2</i> <i>Retain for 5 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	TEC,TECM,TECP,TECT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-20-13b	<p>Fiber Optics - Non Policy Related</p> <p>Material relating to development and use of fiber optics technology throughout BPA's power system. Includes potential commercial applications. Often connected with BPA's microwave systems. Does not include experimental or unique technology. See also ED-12, Research, Development and Demonstration, ED-15, Transmission Lines, ED-20-12, Microwave Systems and MA-20-11, Construction Fiber Optics. (b) Documentation not related to policy or implementation of policy. Includes routine correspondence (not policy statements), planning documents, reports, project development and statements of intent.</p> <p><i>Retention Schedule: N1-305-07-1-11/c</i> <i>Retain for 8 years and then destroy.</i></p>	<p>TET,TETC,TEC TECM,TECP TECT</p>
ED-20-13c	<p>Fiber Optics - Fiber Optics Infrastructure</p> <p>Material relating to development and use of fiber optics technology throughout BPA's power system. Includes potential commercial applications. Often connected with BPA's microwave systems. Does not include experimental or unique technology. See also ED-12, Research, Development and Demonstration, ED-15, Transmission Lines ED-20-12, Microwave Systems and MA-20-11, Construction Fiber Optics. (c) Documentation of all fiber optics infrastructure.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain for 3 years and then destroy.</i></p>	<p>TEC,TECM TECP,TECT</p>
ED-21	<p>System Planning</p> <p>Material relating to planning power transmission systems, Generation Interconnection projects, Lines and/or Loads Interconnection and requests for new transmission service.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active peroid ends upon the commercial operation date or withdrawal of the request from the queue.</i> VITAL RECORD</p>	<p>TPP,TPM</p>
ED-21-11	<p>Customer Utility</p> <p>Customer transmission system data, including studies and correspondence.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	<p>TPC,TPP,TPM</p>

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-21-12	<p>Loads</p> <p>Electrical load data, including forecasting information and forecasts.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i> VITAL RECORD</p>	TPP,TPM
ED-21-13	<p>Resources</p> <p>Electrical generation power and energy data and forecasts. FERC requirement Section 37.7 (b) and 37.6 b (2) (iii) 5/14/2007.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TPC,TPP,TPM
ED-21-14	<p>Capacitor Switching</p> <p>Material relating to switching of series and shunt capacitors for stability control.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TESM,TPP
ED-21-15	<p>Dynamic Braking</p> <p>Material relating to switching of load braking resistors to control system stability.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TESM
ED-21-16	<p>DC Modulation</p> <p>Material relating to modulation of power levels on direct current (DC) transmission lines for stability control.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TPM
ED-21-17	<p>Fast Valving</p> <p>Material relating to fast valving of steam supply to thermal electric generators for stability control.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TPM

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-21-18	<p>Generator Dropping</p> <p>Material relating to disconnection or tripping of electrical generators to control system stability.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TPM
ED-21-19	<p>Single-Pole Relaying</p> <p>Material relating to single-pole relaying and switching of power circuit breakers to control system stability.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TPP
ED-21-20	<p>Load Representation</p> <p>Material relating to load representation and modeling in transient stability computer programs.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TPP,TPM
ED-22	<p>System Analysis Methods</p> <p>Material relating to methods for controlling the transient and dynamic stability of electrical power system.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TESM,TPP TPM
ED-22-11	<p>Power Flow Program</p> <p>Material relating to the BPA and Western Energy Coordinating Council [WECC] power flow computer program.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TPP,TPM
ED-22-12	<p>Transient Stability Program</p> <p>Material relating to the BPA and WECC transient stability computer program.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TPP,TPM

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-22-13	<p>Electromagnetic Transient Program</p> <p>Material relating to BPA's electromagnetic transient computer program (EMTP).</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TECS, TESM
ED-23	<p>System Reliability Criteria</p> <p>Material relating to the planning for system stability.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TEC, TESM TPP, TPM
ED-24	<p>Remedial Action Schemes & Control Systems</p> <p>Material relating to planning, design and construction support of remedial action schemes (RAS). See also OP-16, Stability Control Schemes.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TEC, TECC, TECR TECS, TPP
ED-24-16	<p>HVDC Control Systems</p> <p>Material relating to high voltage direct current (HVDC) intertie controls.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TECC, TECR TECS, TEP, TESM
ED-24-17	<p>Other Control Systems</p> <p>Material relating to control systems not identified in the tertiary subjects ED-24-11 through ED-24-16.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TECC, TECR TECS
ED-25	<p>System Electrical Data Books</p> <p>Source data on all interconnected Northwest electrical systems.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i> VITAL RECORD</p>	TPM

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-27	<p>Geographic Information System</p> <p>BPA's geographic information system (GIS) is an automated system designed to capture, store, process, analyze and display geographic data. Uses of the GIS include transmission routing and planning studies, fish and wildlife projects, other natural resources-related studies, generating resources projects and a variety of other studies which involve the analysis of the geographic distribution of data. Products include hardcopy maps and reports. The basic GIS data is retained electronically and is continually updated. Disposition: Transfer to NARA only the layers uniquely created or significantly altered by BPA.</p> <p><i>Retention Schedule: N1-305-07-1-19/b/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	TERG
ED-28	<p>Softcopy</p> <p>BPA's Softcopy system is a data-collecting tool to provide baseline information for many transmission facilities and other functions. Data are stored electronically although records include hardcopy like correspondence, reports and background material about image processing systems, methods and projects. The Softcopy system came from the research and development sector in 1985. As of 1990, continued development of Softcopy as a production tool is anticipated. Forecasted application areas include digital photomaps, spatial data for the Geographic Information System (GIS) and image classification (such as land use). Softcopy is integrated with the computer-assisted mapping (CAM) system (ED-29) (also called CAD, computer-assisted design), the GIS (ED-27), Stereoplotter systems and surveys. The electronic dated is continually updated.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	TERM,TERG
ED-30	<p>Substation Structures and Foundations</p> <p>Material relating to design and construction support of substation structures and foundations. a) Substation work. b) Seismic Design and Mitigation work.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	TELD,TESD TESF

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
ED-31	<p>Building Facilities Design & Construction Support</p> <p>Material relating to design and construction support of building facilities and site utilities. See also MA-12-14, TLM Equipment and Materials. a) Architectural work. b) Engineering work.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	TELD,TELS TESF
ED-32	<p>Structural Engineering, Analysis and Design</p> <p>Material related to structural analysis and design of other facilities not covered by other file codes. See also MA-12-14, TLM Equipment and Materials. a) Microwave Facilities - Towers work. b) Access Road Bridge work.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	TELD,TESF

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ	<p>Environmental Quality</p> <p>Material relating to development and implementation of policy and procedures for environmental evaluations and ecological and pollution issues. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
EQ-12	<p>Environmental Coordination/Adaptive Management/Policy Development</p> <p>Material relating to coordination of environmental quality objectives with all programs and activities of BPA. Development and implementation of monitoring, adaptive management activities and the development and implementation of policy to assess environmental impact of BPA programs. Includes coordination activities with other agencies and organizations. Includes interagency and intra-agency correspondence, memorandums of understanding or agreement, technical descriptions and documentation of meetings, conversations and information that support environmental policy decisions. See also ED-19, Engineering Environmental Considerations.</p> <p><i>Retention Schedule: N1-305-07-1-12/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	KEC,KEP, KEWB,PGB
EQ-12-11	<p>Environmental Standards and Procedures/Templates</p> <p>Documentation of procedures designed to instruct BPA personnel in specific actions which will assure that BPA's construction, operations and maintenance activities are planned and conducted in ways that minimize adverse effects on the environment. Document templates to be used in correspondence or documentation related to analysis of environmental impacts of BPA actions.</p> <p><i>Retention Schedule: N1-305-07-1-12/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	KEC,KEP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-13	<p>Environmental Assessments</p> <p>Material relating to the preparation, review and approval process for Environmental Assessments (EA's). Essential documents include EA Determination Letter, signed Findings of No Significant Impact (FONSIs), approved EAs (with signature), public involvement plan (if applicable), public meeting advertisements, supporting materials and notes, public scoping comments and summary, correspondence with tribes, agencies and other interested parties, but not related to Endangered Species Act or National Historic Preservation Act, agreements with other agencies, comment letters on preliminary EA, Mitigation Action Plans and Federal Register notices.</p> <p><i>Retention Schedule: N1-305-07-1-12/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KEC,KEP,PGB
EQ-14	<p>Environmental Impact Statements</p> <p>Material relating to the preparation, review and approval of Environmental Impact Statements (EISs) for BPA projects. Essential documents include notices of intent, public involvement plan (if applicable), public meeting advertisements, supporting materials and notes, public scoping comments and summary, correspondence with tribes, agencies and other interested parties, but not related to Endangered Species Act or National Historic Preservation Act, agreements with other agencies, DOE transmittal letters, Draft EISs, Final EISs, comments on the draft and final EIS, Records of Decision and Mitigation Action Plans. May also include copies of environmental assessments, special studies and other supplementary material created in the course of EIS preparation.</p> <p><i>Retention Schedule: N1-305-07-1-12/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>Active period ends 90 days after the Record of Decision is signed. NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KEC,KEP,KEW, KEWL,KEWM, KEWR,KEWU, PGB

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-14-11	<p data-bbox="391 363 704 390">Supplement Analyses (SA)</p> <p data-bbox="391 411 1224 684">Material relating to the preparation, review and approval of a Supplement Analysis to an Environmental Impact Statement (EIS) for BPA projects. Essential documents include public involvement materials (if applicable), supporting materials and notes, public scoping comments and summary (if applicable), correspondence with tribes, agencies and other interested parties, but not related to Endangered Species Act or National Historic Preservation Act, agreements with other agencies, Mitigation Action Plans (if necessary) and the signed Supplement Analysis. May also include special studies and other supplementary material created in the course of SA preparation.</p> <p data-bbox="391 699 1101 793"><i>Retention Schedule: N1-305-07-1-12/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KEC,KEP,PGB
EQ-15	<p data-bbox="391 863 662 890">Categorical Exclusions</p> <p data-bbox="391 911 1224 1121">Material relating to documenting the application of Categorical Exclusions (usually through memorandums). Essential NEPA documents include the signed Categorical Exclusion memorandum, public meeting materials (if applicable), supporting materials and notes (if applicable), public scoping comments and summary (if applicable), correspondence with tribes, agencies and other interested parties, but not related to Endangered Species Act or National Historic Preservation Act and agreements with other agencies.</p> <p data-bbox="391 1136 1224 1262"><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>Active period ends when Categorical Exclusion memorandum is signed by the NEPA Compliance Officer or delegate.</i></p>	KEC,KEP,PGB
EQ-16	<p data-bbox="391 1331 675 1358">Environmental Reviews</p> <p data-bbox="391 1379 1247 1558">Reviews and comments prepared relative to environmental documents of other agencies and organizations, including projects where BPA is a Cooperating Agency. Essential documents include agreements with other agencies, pertinent correspondence to lead agency and comments provided on final documents. May also include special studies and other supplementary material created in the course of NEPA preparation.</p> <p data-bbox="391 1572 943 1633"><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain while Active + 20 years, and then destroy.</i></p>	KEC,KEP,PGB

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-17	<p>Environmental Audit and Appraisal</p> <p>Appraisals of BPA facilities and activities that have environmental effects. Based on Environmental Protection Agency C/18(9) and 42 U.S.C. 9603 CERCLA, Subsection 103(d) (as amended by the Superfund Amendments and Reauthorization Act (SARA)).</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	KEP
EQ-17-11	<p>Management Appraisals</p> <p>Material relating to establishment and implementation of the Environmental Appraisal Program plans. Based on Environmental Protection Agency C/18(9).</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain for 12 years and then destroy.</i></p>	KEP
EQ-17-12	<p>Functional Appraisals</p> <p>Material relating to annual review of environmental specialty disciplines as applicable to elements of the environmental program. Based on Environmental Protection Agency C/18(9).</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain for 12 years and then destroy.</i></p>	KEP
EQ-17-13	<p>Field Appraisals</p> <p>Documentation of annual on-site appraisals of environmental program effectiveness. Based on 42 U.S.C. 9603 CERCLA, Subsection 103(d) (as amended by the Superfund Amendments and Reauthorization Act (SARA)).</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	KEP
EQ-17-14	<p>Internal Audits</p> <p>Material relating to the examination and evaluation of work with environmental program standards. See also MN-17, Audits. Based on Environmental Protection Agency C/18(9).</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain for 12 years and then destroy.</i></p>	KEP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-18-11a	<p>Resource Conservation and Recovery Act</p> <p>(a) Biennial, exception and other Resource Conservation and Recovery Act (RCRA) reports and hazardous waste manifests Also includes Annual Dangerous Waste Reports, EPA ID Numbers for Installations, Underground Storage Tanks (UST) data and all other RCRA material, including compliance data. Based on 40 CFR 262.40, CFR 265, Subpart E and 42 U.S.C. 9603 CERCLA, Subsection 103(d). 1991.</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain for 50 years and then destroy.</i></p>	Z
EQ-18-11b	<p>Resource Conservation and Recovery Act</p> <p>(b) RCRA test results and waste analyses. Based on 42 U.S.C. 9603 CERCLA, Subsection 103(d) (as amended by the Superfund Amendments and Reauthorization Act (SARA)).</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	Z
EQ-18-11c	<p>Resource Conservation and Recovery Act</p> <p>(c) Hazardous waste storage facility operating records and closure plans (Ross Complex). Based on 42 U.S.C. 9603 CERCLA, Subsection 103(d) (as amended by the Superfund Amendments and Reauthorization Act (SARA)).</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain while Active + 50 years, and then destroy.</i> <i>Active period ends when facility is closed and closure is certified.</i></p>	KEP
EQ-18-12	<p>Toxic Substance Control Act</p> <p>Toxic Substance Control Act (TSCA) inspections, action plans, equipment disposal, PCB annual report and PCB spill reports. Based on 40 CFR 761.125 and 40 CFR 761.180, Subpart H.</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	Z

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-18-13	<p>Comprehensive Environmental Response Compensation and Liability Act</p> <p>Material relating to technical, general regulatory and policy correspondence of the Comprehensive Environmental Response Compensation and Liability Act (CERCLA) (as amended by the Superfund Amendments and Reauthorization Act (SARA)). Includes Emergency Community Right to Know Act (EPCRA) information. File all material here except as specified in the following subjects. Based on 42 U.S.C. 9603 CERCLA, Subsection 103(d) (as amended by SARA).</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain for 50 years and then destroy.</i></p>	KEP
EQ-18-13a	<p>Comprehensive Environmental Response Compensation and Liability Act</p> <p>(a) Agreements and related material about the CERCLA (as amended by SARA) and the Superfund. Based on 42 U.S.C. 9603 CERCLA, Subsection 103(d).</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain for 50 years and then destroy.</i></p>	KEP
EQ-18-13b	<p>Comprehensive Environmental Response Compensation and Liability Act</p> <p>(b) Documentation about CERCLA (as amended by SARA) remedial investigations and site feasibility studies. Based on Environmental Protection Agency C/21 (17)(b).</p> <p><i>Retention Schedule: N1-305-07-1-12/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	Z
EQ-18-14	<p>Uniform Hazardous Waste Manifests</p> <p>The original manifest for shipping hazardous wastes which include Toxic Substances Control Act (TSCA) regulated PCB and PCB contaminated equipment, nonregulated PCB-contaminated equipment and hazardous wastes shipped off-site. See also TT-12-13, BPA Rail Cars, Carrier Files, Hazardous Materials. Based on 42 U.S.C. 9603, CERCLA 103(d) (as amended by the Superfund Amendments and Reauthorization Act (SARA)).</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain while Active + 55 years, and then destroy.</i> <i>Active period ends when at the date of acceptance by initial transporter or from date of acceptance at a BPA hazardous waste facility.</i></p>	Z

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-18a	<p>Hazardous Waste Management - General Documentation About Management</p> <p>(a) General documentation about BPA's management of hazardous waste. Use detailed record series below if applicable.</p> <p><i>Retention Schedule: N1-305-07-1-12/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	KEP
EQ-18b	<p>Hazardous Waste Management - Documentation of BPA's Actions</p> <p>(b) Documentation of BPA's actions on topics such as PCB tracking, test results and sampling, PCB Capacitor Replacement program, Ross Dangerous Waste Areas Closure, Soil Samples, Waste Minimization and Pollution Prevention, Oregon DEQ's Clean Up Program/Oversight fees, DOT's HazMat Transportation Registration and Fee Assessment, EPA ID Numbers for Installations, McNary Paint Overspray Clean Up, Non-Compliance items and Hazardous Waste Planning fees.</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain for 50 years and then destroy.</i></p>	KEP
EQ-19	<p>Environmental Contaminants</p> <p>Material relating to the effects and hazards of all types of contaminants.</p> <p><i>Retention Schedule: N1-305-07-1-12/a</i> <i>Retain until superseded, then destroy</i></p>	KEP
EQ-20	<p>Other Regulatory Actions</p> <p>Material relating to actions either on the part of or that affect BPA's programs and activities and that are not addressed elsewhere. Based on 42 U.S.C. 9603 CERCLA, Subsection 103(d) (as amended by the Superfund Amendments and Reauthorization Act (SARA)).</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain for 50 years and then destroy.</i></p>	KEP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-20-11	<p>Clean Water Act</p> <p>Material relating to technical, general regulatory and policy correspondence related to the portions of the Clean Water Act (CWA) that affect BPA including oil spill containment, SPCC plans, nonpoint source pollution control, water quality standards and material relating to National Pollutant Discharge Elimination System (NPDES). Based on Public Law 92-500 (as amended by Public Law 95-217), Public Law 100-4 and 42 U.S.C. 9603 CERCLA Subsection 103(d) (as amended by the Superfund Amendments and Reauthorization Act (SARA)).</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	Z
EQ-20-12	<p>Safe Drinking Water Act</p> <p>Technical reports, general and technical regulatory correspondence and policy documents, legal opinions related to Federal and State legislation. Programs relating to Sole Source Aquifer Program, Wellhead Protection Program, State Ground Water Standards and Underground Injection Control Program. Based on Environmental Protection Agency C/3(10)(f)(2) and 42 U.S.C. 9603 CERCLA, Subsection 103(d) (as amended by the Superfund Amendments and Reauthorization Act (SARA)).</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	KEC,KEP
EQ-20-13	<p>Clean Air Act</p> <p>Material relating to (a) attainment of National Ambient Air Quality Standards (b) emissions of criteria pollutants (c) mobile sources (auto emissions and standards) (d) hazardous air pollutants (e) acid rain (f) permits and (g) stratospheric ozone depletion. See also EQ-25, Air Quality.</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	KEC,KEP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-21	<p>Endangered Species Act</p> <p>Material relating to BPA's general program and activities that affect or are affected by the Endangered Species Act (ESA) inclusive of all sections of the act. Includes material relating to legislation, implementing regulations, regulatory analysis and internal BPA policy related to implementation and interpretation of ESA. Could include inter-agency or intra-agency correspondence in support of ESA implementation policy.</p> <p><i>Retention Schedule: N1-305-07-1-12/e/2</i> <i>Retain while Active + 30 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KE,KEC,KEW, PGB
EQ-21-11	<p>Endangered Species Act Section 6</p> <p>Materials documenting State's incidental take permits and conservation plans relating to BPA-funded actions. Includes public, Federal agency or other documents, technical information and related documentation and action items.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain while Active + 20 years, and then destroy.</i></p>	KEC,KEP,KEW, KEWL,KEWR, KEWU,PGB
EQ-22	<p>Endangered Species Act Section 4</p> <p>Material relating to BPA's participation in public processes to list species as threatened or endangered under the Endangered Species Act, to designate critical habitat for listed species, comment on the 5-year species review and to develop a recovery plan. Material relating to documentation of the rule exemption by non-federal entities. Includes Hatchery and Genetic Management Plans, public, Federal agency and other petitions, BPA analyses and technical information, decision paper and action items used in the NOAA Fisheries/U.S. Fish and Wildlife Service processes.</p> <p><i>Retention Schedule: N1-305-07-1-12/d</i> <i>Retain while Active + 30 years, and then destroy.</i></p>	KEC,KEP,KEW, KEWL,KEWM, KEWR,KEWU, PGB
EQ-23	<p>Endangered Species Act Section 7 No Effect Determination</p> <p>Material relating to BPA generated memorandum that documents rationale to conclude that the proposed project actions would have no effect to those species and/or critical habitat. Includes requests for technical assistance with NOAA Fisheries and/or U.S. Fish and Wildlife Service, technical supporting information, inter-agency correspondence documenting No Effect concurrence, species list and material relating to documentation of No Effect emergency consultation.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain while Active + 20 years, and then destroy.</i></p>	KEC,KEP,KEW, KEWL,KEWM, KEWR,KEWU, PGB

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-23-11	<p>Endangered Species Act Section 7 May Affect, Not Likely to Adversely Affect Determination</p> <p>Material relating to documentation of informal consultation with NOAA Fisheries and/or U.S. Fish and Wildlife Service. Includes technical supporting information, documents incorporated by reference, inter-agency correspondence, species list, incidental take statements, material relating to documentation of emergency informal consultation, biological assessment and supporting documentation and letter of concurrence.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain while Active + 20 years, and then destroy.</i></p>	KEC,KEP
EQ-23-12	<p>Endangered Species Act Section 7 May Affect, Likely to Adversely Affect Determination</p> <p>Material relating to documentation of formal consultation with NOAA Fisheries and/or U.S. Fish and Wildlife Service. Includes technical supporting information, documents incorporated by reference, inter-agency correspondence, species list, incidental take statements, material relating to documentation of emergency formal consultation, biological assessment and supporting documentation and biological opinion.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain while Active + 20 years, and then destroy.</i></p>	KEC,KEP
EQ-23-13	<p>Endangered Species Act Section 7 Programmatic Biological Opinions</p> <p>Material relating to documentation of programmatic consultation with NOAA Fisheries and/or U.S. Fish and Wildlife Service. Includes technical supporting information, documents incorporated by reference, inter-agency correspondence, species list, biological assessment and supporting documentation, programmatic biological opinion and documents showing compliance with the programmatic opinion.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain while Active + 20 years, and then destroy.</i></p>	KEC,KEP,KEW, KEWL,KEWM, KEWR,KEWU, PGB
EQ-24	<p>Endangered Species Act Section 10</p> <p>Material relating to BPA actions requiring Section 10 permit applications and issuance. Includes public, Federal agency or other documents, technical information and related documentation and action items.</p> <p><i>Retention Schedule: N1-305-07-1-12/d</i> <i>Retain while Active + 30 years, and then destroy.</i></p>	KEC,KEP,KEW, KEWL,KEWM, KEWR,KEWU, PGB

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-25	<p>Air Quality</p> <p>Documentation of BPA's air-related work not covered under EQ-20-13, Clean Air Act such as indoor air, control equipment and greenhouse gasses. See also EQ-20-13, Clean Air Act.</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain for 50 years and then destroy.</i></p>	KEC
EQ-26	<p>Aquatic Nuisance Species (ANS)</p> <p>Materials relating to development and implementation of policy and procedures for Aquatic Nuisance Species that threaten the diversity or abundance of native species and listed endangered species.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	PGF
EQ-26-11	<p>ANS Passage Through Hydropower Plants</p> <p>Documentation of the computer model, including development and operation, that evaluates the effect of options available and mitigation of invasive species at hydropower operations and other related stations.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	PGF
EQ-26-12	<p>ANS Mitigation/Planning</p> <p>BPA activities dealing with ANS mitigation, enhancement actions, identification and quantification of losses and the development of mitigation plans.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	PGF
EQ-27	<p>Cultural Resource Management</p> <p>Materials relating to management of the Cultural Resource program. Includes broad programmatic agreements.</p> <p><i>Retention Schedule: N1-305-07-1-12/d</i> <i>Retain while Active + 30 years, and then destroy.</i></p>	KEC,PGF

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EQ-27-11	<p>Cultural Resource Support to FCRPS Program</p> <p>Materials relating to cultural resource compliance for the FCRPS program. Includes annual program of work, correspondence with Tribes, SHPO's, THPO's and program specific programmatic agreements, but no sensitive cultural resource information.</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	KEC,PGF
EQ-27-12	<p>Compliance with Section 106 of NHPA</p> <p>Materials relating to Section 106 cultural resource compliance for BPA projects, including Transmission and Power projects and the Fish and Wildlife program. Includes correspondence with Tribes, SHPO's, THPO's and agreements, but no sensitive cultural resource information.</p> <p><i>Retention Schedule: N1-305-07-1-12/e/1</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	KEC,KEP,KEW, KEWL,KEWM, KEWU,KEWR, PGF

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EX	<p>External Issues</p> <p>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. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
EX-11-11	<p>Audiovisual/Photography</p> <p>Documentation about audiovisual/photography products, processes, policy, procedures and systems. The products themselves are described in subcategories below [(a) through (j)]. "Audiovisual" refers to audio, visual and audiovisual material unless otherwise specified.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	NHTL
EX-11-11a	<p>Audiovisual/Photography - Photographs, Images, Original Graphic Art</p> <p>(a) Photographs, images, original graphic art/illustrations, three-dimensional exhibits, still and motion pictures, video and sound recordings. Includes captions, text, scripts and identifications related to these items and other closely associated documentation. Includes agency-sponsored media for public distribution or internal training as well as other material not identified below.</p> <p><i>Retention Schedule: N1-305-07-1-17/d/2</i> <i>Retain while Active + 30 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	NHTL
EX-11-11b	<p>Audiovisual/Photography - Routine Audiovisual Productions</p> <p>(b) Routine audiovisual productions not related to BPA mission functions.</p> <p><i>Retention Schedule: GRS-21/1</i> <i>Retain for 1 years and then destroy.</i></p>	Z
EX-11-11e	<p>Audiovisual/Photography - Personnel Identification Photographs</p> <p>(e) Personnel identification photographs for current employees.</p> <p><i>Retention Schedule: GRS-21/2</i> <i>Retain for 5 years and then destroy.</i></p>	NT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EX-11-11f	<p>Audiovisual/Photography - Line and Halftone Negatives</p> <p>(f) Line and halftone negatives, screen paper prints, offset lithographic and offset lithographic plates used for photo-mechanical reproduction.</p> <p><i>Retention Schedule: NI-305-07-1-17/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Active period ends when no longer needed for publication or reprinting.</i></p>	NWPP
EX-11-11g	<p>Audiovisual/Photography - Line Copies of Graphs and Charts</p> <p>(g) Line copies of graphs and charts.</p> <p><i>Retention Schedule: GRS-21/8</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Active period ends when no longer needed for publication or reprinting.</i></p>	Z
EX-11-11h	<p>Audiovisual/Photography - Routine Surveillance Footage</p> <p>(h) Routine surveillance footage and recordings.</p> <p><i>Retention Schedule: GRS-21/11</i> <i>Retain for 0.5 years and then destroy.</i></p>	NT
EX-11-11j	<p>Audiovisual/Photography - Dictation Tapes and Recordings</p> <p>(j) Dictation tapes and recordings made exclusively for transcription or notetaking.</p> <p><i>Retention Schedule: GRS-21/23</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Active period ends immediately after use.</i></p>	Z
EX-11-12	<p>History/Annual Reports</p> <p>Material reflecting BPA history and including BPA Annual Reports.</p> <p><i>Retention Schedule: NI-305-07-1-5/d</i> <i>Retain for 20 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	DKC,NWPP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EX-11-13	<p>Media Contacts</p> <p>Records of current contacts for all media, approximate extent, kind of audience reached by the different news and public affairs media, schedules of news deadlines and style guidelines.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	DKP
EX-11-14	<p>News, Radio, and TV Releases</p> <p>News releases and scripts of radio and television presentations.</p> <p><i>Retention Schedule: N1-305-07-1-17/d/2</i> <i>Retain while Active + 25 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	DKP
EX-11-15	<p>Publications</p> <p>Record copy of each BPA-numbered publication. A record set (one printed copy of each publication) is sent to the National Archives and Records Administration regional office in Seattle annually. BPA's Office of External Affairs ensures that a complete set is transmitted to BPA's Records Management for shipment to NARA. BPA's library maintains a set of all BPA-numbered publications as a local history of BPA's work. Distribution is made upon request to professional, technical and educational organizations as well as to the public, while the documents are in print.</p> <p><i>Retention Schedule: N1-305-07-1-17/d/2</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	DKE,NHTL,NW PP
EX-11-16	<p>Speeches</p> <p>Copies of speeches by the Administrator and senior officials that affect BPA program activities.</p> <p><i>Retention Schedule: N1-305-07-1-17/d/2</i> <i>Retain while Active + 25 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	DKP
EX-11-17	<p>Press Clippings</p> <p>Copies of material appearing in the press concerning BPA policies and activities.</p> <p><i>Retention Schedule: N1-305-07-1-23/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	DKP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EX-12-11	<p>Conferences/Symposiums</p> <p>Planning, implementation, and evaluation of BPA-sponsored or co-sponsored public conferences or symposia. Published proceedings assigned BPA publication numbers are retained according to EX-11-15, Publications.</p> <p><i>Retention Schedule: N1-305-07-1-17/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	Z
EX-12-12	<p>Commendations/Criticism</p> <p>Unsolicited comments from the public or other organizations on BPA activities including public involvement efforts and program and other programs or policies for which a request for comments is not issued.</p> <p><i>Retention Schedule: GRS-14/5</i> <i>Retain for 0.25 years and then destroy.</i></p>	Z
EX-12-13a	<p>Requests for Public Involvement/Understanding - Accepted Programs</p> <p>(a) Accepted programs submitted to BPA by the public requesting BPA resources to further any public involvement process or public understanding of BPA programs and issues. Includes funding requests (for example, intervenor funding), sponsorships and creation of working committees.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	DKE, KL, KLH, KLJ, KLJB, KLJC, KLJD, KLK
EX-12-13b	<p>Requests for Public Involvement/Understanding - Rejected Proposals</p> <p>(b) Rejected proposals.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	DKE
EX-12a	<p>Public Involvement - Short-Term Activities</p> <p>(a) Short-term activities and procedures reflecting BPA's effort to involve the public in BPA issues.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	DKE

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EX-12b	<p>Public Involvement - Long-Term Activities</p> <p>Material about BPA's public involvement activities and procedures. An original Public Record is maintained by the program organization according to the retention period set for its subject classification, unless delegated to DMC. (b) Material that supports BPA public involvement policy and long-term procedures which impact the rights of individuals. (b) Material that supports BPA public involvement policy and long-term procedures which impact the rights of individuals.</p> <p><i>Retention Schedule: N1-305-07-1-17/d/1</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	DKE
EX-13	<p>Public Information</p> <p>Material of formally designated information office relating to the creation and dissemination of information designed to help the public or an elected official understand BPA programs and policies. May include confidential information.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain for 5 years and then destroy.</i></p>	DKC,KEW,KE WB,KEWL,KE WM,KEWR,KE WU
EX-13-11	<p>Educational Activities</p> <p>BPA's involvement in cooperative educational programs and projects with private groups, educational agencies and organizations, State and other Federal agencies.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	DKE
EX-13-12	<p>General Inquiries</p> <p>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. Includes critical and sensitive information requests, detailed map requests and non-disclosure agreements.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain for 5 years and then destroy.</i></p>	Z

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EX-13-13a	<p>FOIA Responses - Responses Granting Access</p> <p>Responses to inquiries that cite the Freedom of Information Act (FOIA). Responses include the original request and a copy of all material sent to the requester. (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.</p> <p><i>Retention Schedule: GRS-14/11(1) and (2)</i> <i>Retain for 2 years and then destroy.</i></p>	DK
EX-13-13b	<p>FOIA Responses - Responses Denying Access -</p> <p>Responses to inquiries that cite the Freedom of Information Act (FOIA). Responses include the original request and a copy of all material sent to the requester. (b) Responses denying, in part or total, access to requested records.</p> <p><i>Retention Schedule: GRS-14/11(3)</i> <i>Retain for 6 years and then destroy.</i></p>	DK
EX-13-13c	<p>FOIA Responses - Appeals to Responses</p> <p>Responses to inquiries that cite the Freedom of Information Act (FOIA). Responses include the original request and a copy of all material sent to the requester. (c) Appeals to BPA responses to FOIA requests.</p> <p><i>Retention Schedule: GRS-14/12</i> <i>Retain for 6 years and then destroy.</i></p>	DK
EX-13-14	<p>Public Information Center</p> <p>Documents relating to the development, operation and services of the BPA Public Information Center which provides information to the public including requests for educational materials.</p> <p><i>Retention Schedule: NI-305-07-1-17/b</i> <i>Retain for 5 years and then destroy.</i></p>	NHTL
EX-13-15	<p>Visitors</p> <p>Visitor logs and other documentation of public visits including preparation, itineraries, tour arrangements and related correspondence.</p> <p><i>Retention Schedule: NI-305-07-1-15/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	Z

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EX-13-16	<p>Congressional Hearings</p> <p>Provisions for information for decision-making about policy and issues conducted through congressional hearings including background information, BPA formal testimony, questions and answers, contract data and summary, previous and pending correspondence and biographies. For Congressional inquiries, see EX-15-12, External Relations-Federal.</p> <p><i>Retention Schedule: N1-305-07-1-5/d</i> <i>Retain while Active + 4 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	DKN,DKR
EX-14	<p>Special Events</p> <p>Material for informational and honorary events and evaluations of their effectiveness. Includes preparation, publicity and participation.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	Z
EX-15	<p>External Relations</p> <p>Contacts and relationships with governmental units and officials and with public and private individuals, organizations and groups. Includes agreements and memorandums of understanding (MOA and MOU). Does not include contracts or customer files. See also MN-15, Long Range Goals and Strategic Choices.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	DKR,KEW,KE WL,KEWM,KE WR,KEWU,KL, KLH,KLJ,KLJB KLJC,KLJD KLK,P,PPF
EX-15-11	<p>Foreign</p> <p>Contacts with governments, organizations, agencies and individuals outside the United States.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	Z
EX-15-12	<p>Federal</p> <p>Contacts with U.S. governmental agencies and officials, including Congressional inquiries and responses.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	DKR,KEW,KE WL,KEWM,KE WR,KEWU,TPP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EX-15-13	<p>State</p> <p>Contacts with U.S. State agencies and officials.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i></p> <p><i>Retain while Active + 5 years, and then destroy.</i></p>	<p>DKR,KEW,KEWL,KEWM,KEWR,KEWU,TPP</p>
EX-15-14	<p>Municipalities</p> <p>Contacts with agencies and officials of U.S. cities.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i></p> <p><i>Retain while Active + 5 years, and then destroy.</i></p>	<p>DKR,TPP</p>
EX-15-15	<p>Tribal</p> <p>Contacts with agencies and officials of American Indian tribes.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i></p> <p><i>Retain while Active + 5 years, and then destroy.</i></p>	<p>DKT,KEW,KEWL,KEWM,KEWR,KEWU,PGF,TPP</p>
EX-15-16	<p>Utility Organizations</p> <p>Contacts with utility groups and organizations such as public utility districts, utility cooperatives and private utilities. Does not include customer files.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i></p> <p><i>Retain while Active + 5 years, and then destroy.</i></p>	<p>Z</p>
EX-15-17	<p>Industries</p> <p>Contacts with direct service and other industries.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i></p> <p><i>Retain while Active + 5 years, and then destroy.</i></p>	<p>Z</p>
EX-15-18	<p>Northwest Power Planning Council</p> <p>Contacts with officials and subunits of the NWPPC.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i></p> <p><i>Retain while Active + 5 years, and then destroy.</i></p>	<p>DKR,KEW,KEWL,KEWM,KEWR,KEWU,PPF,TPP</p>

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
EX-15-19	<p>Other Councils</p> <p>Contacts with national, regional and local energy councils.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i></p> <p><i>Retain while Active + 5 years, and then destroy.</i></p>	<p>KEW,KEWB KEWL,KEWM KEWR,KEWU TPP</p>
EX-15-20	<p>Public Individuals, Groups & Organizations</p> <p>Contacts with groups, organizations and individuals not associated with governmental units and not covered by the other tertiary subjects identified above.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i></p> <p><i>Retain while Active + 5 years, and then destroy.</i></p>	Z

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI	<p>Finance</p> <p>Material relating to the accounting and control of assets, capital acquisition, investment and management of these subjects, financial information and financial services such as payroll, collections, disbursements and trust agreements. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
FI-11	<p>Journal Vouchers</p> <p>The electronic registers of BPA's financial transactions.</p> <p><i>Retention Schedule: GRS-7/2</i> <i>Retain for 6.25 years and then destroy.</i></p>	FRG
FI-11-11	<p>Accounts Payable</p> <p>Material relating to payment for BPA's goods and services.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 4 years and then destroy.</i> VITAL RECORD</p>	FTD
FI-11-12	<p>Conservation Accounting</p> <p>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, Conservation Programs.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	FTD
FI-12-11	<p>Plant Record Ledgers</p> <p>Hard copy ledgers of electric plant accounts including land and other fixed assets of BPA's system showing the cost by FERC class. Includes the property unit summary, the Plant Investment Catalog and the analyzed work orders. See also ED-13, Work Orders.</p> <p><i>Retention Schedule: N1-305-07-1-9/e/1</i> <i>Retain for 50 years and then destroy.</i></p>	FRP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-12-12	<p>Plant Construction Records</p> <p>Details of costs collected in the work orders through construction work-in-progress and supplemental/supporting documents used for analysis, reports and studies.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain for 10 years and then destroy.</i></p>	FRP
FI-12-13	<p>Depreciation Summaries and Memorandum Adjustments</p> <p>Hardcopy ledgers listing cost of plant retired by year installed and retired for mortality studies. Computerization of depreciation expenses of electric plant includes adjustments to depreciation. Includes journal vouchers affecting general ledger accounts and original Construction Project Authorizations (CPAs).</p> <p><i>Retention Schedule: N1-305-07-1-9/e/1</i> <i>Retain for 25 years and then destroy.</i></p>	FRP
FI-13	<p>Property Accounting</p> <p>Material relating to matters on property accounting and financial details supporting the plant accounting activity. See also SU-14, Materials Management and SU-16, Supplies and Equipment. Based on GRS 6/5(a).</p> <p><i>Retention Schedule: GRS-6/5(a)</i> <i>Retain for 2 years and then destroy.</i></p>	FRP
FI-13-11	<p>Property Loss Reports</p> <p>Material used to relieve property custodians of accountability. BPA F4420.12e is used for this report.</p> <p><i>Retention Schedule: N1-305-07-1-10/b</i> <i>Retain for 7 years and then destroy.</i></p>	Z
FI-13-12	<p>Property Survey Reports</p> <p>Original copy of form BPA 4420.14 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.</p> <p><i>Retention Schedule: N1-305-07-1-10/b</i> <i>Retain for 3 years and then destroy.</i></p>	DGP,NSLU

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-13-13	<p>Custodian Authorization</p> <p>Material relating to establish and approve designation of BPA employees as property custodians.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain until superseded, then destroy</i></p>	Z
FI-13-14	<p>Custodian Account Reviews</p> <p>Documents that track procedural compliance reviews, field trip investigations and account spot-checks (site audits) for personal property custodians.</p> <p><i>Retention Schedule: GRS-6/1(a)</i> <i>Retain for 6.25 years and then destroy.</i></p>	DGP
FI-13-15	<p>Personal Property Financial Control Reports</p> <p>Monthly subsidiary ledger reports.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain for 7 years and then destroy.</i></p>	DGP
FI-13-17	<p>Personal Property Accounting System Procedures</p> <p>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 Policy.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	DGP
FI-14	<p>Financial Statements and Agreed Upon Procedures (AUPs)</p> <p>Material relating to the Federal Columbia River Power System's (FCRPS) financial statements and reports. Also included are letters of engagement and management representation letters (agreed upon procedures), prepared by BPA's external auditor, that relate to financial topics. Also includes A-123. Ethics Code of Conduct.</p> <p><i>Retention Schedule: N1-305-07-1-9/a</i> <i>Retain until superseded, then destroy</i></p>	DGC,DGF,DGP, F,FR,FRS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-16	<p>Treasury Schedules</p> <p>Records showing checks authorized by BPA to be issued by the U.S. Treasury as payment for specific vouchers. See also FI-19-18, Payroll Schedules and FI-21-13, Cash Flow.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain for 5 years and then destroy.</i></p>	FTD
FI-16-11	<p>1099 Reporting</p> <p>Material relating to BPA's function to providing IRS Form 1099 to BPA's vendors pursuant to IRS Code 6041 and subsequent electronic filing with the IRS. Includes a copy of each 1099 sent and filed for a given tax year. This series is also to include official documents in support of IRS Form 1099 Reporting such as: Substitute IRS Form W9e, Request for Taxpayer Identification Number and Certification completed by active vendors and B-Notice Letters pursuant to any IRS Form CP2100 or CP2100A received for mismatches of data between BPA and IRS Records for a given filing of IRS Form 1099.</p> <p><i>Retention Schedule: GRS-6/1(a)</i> <i>Retain for 6 years and then destroy.</i></p>	FTD,NSTS,TEL
FI-17	<p>Expenditure Documentation</p> <p>Records that authorize expenditures. Attachments include customer invoices. Includes form BPA 4230.01, Confirmation of Small Purchase and Prompt Payment Act reporting information for BPA payment for goods and services covered by the Prompt Payment Act. See also LA-13, Title and Payment, LA-15, Maintenance Trees and SU-12, Procurement Action. Formerly entitled 'Vouchers'.</p> <p><i>Retention Schedule: GRS-6/1(a)</i> <i>Retain for 6.25 years and then destroy.</i> <i>Litigation Hold.11/2007 (Note: corrected date from 4/2008 per correspondence from General Counsel.)</i></p>	FTD,L
FI-17-11	<p>Purchase Card Receipts</p> <p>Material relating to BPA's use of commercial credit cards, such as VISA and established alternate payment methods.</p> <p><i>Retention Schedule: GRS-6/1(a)</i> <i>Retain for 6.25 years and then destroy.</i> <i>Litigation Hold 11/2007 (Note: corrected from 4/2008 per correspondence from General Counsel.)</i></p>	NSTS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-18	<p>Time and Attendance Reporting</p> <p>Records used to input time and attendance data into a payroll system. Example: Annual Employee Time and Labor Worksheet, Daily Work Report, Time and Labor Employee Worksheet, Substation Maintenance Time Sheet, including e-mail messages. Time Books, sign-in/sign-out sheets, credit hour logs, and other documents that record employees' attendance (hours of work), including flextime/flex schedule documents.</p> <p><i>Retention Schedule: GRS-2/8</i> <i>Retain for 6 years and then destroy.</i></p>	Z
FI-18-11	<p>T & A Supporting Documents</p> <p>The prescribed form, such as the Request for Leave or Approved Absence, OPM Form 71 or equivalent. Includes e-mail messages and any supporting documentation of requests and approvals of leave used to record leave used by the employee, except as specified below. a) The document used to approve and record extended (over 80 hours) leave without pay (SF-50B). b) The document, such as OPM Form 71e, used to authorize the use of sick or annual leave or compensatory time in the pay period immediately before termination of employment.</p> <p><i>Retention Schedule: GRS-2/6</i> <i>Retain for 3 years and then destroy.</i></p>	Z
FI-19-11	<p>Payroll Operations -Individual Accounts</p> <p>Material relating to employee earnings, deductions and level by pay period, quarter and pay year.</p> <p><i>Retention Schedule: GRS-2/1</i> <i>Retain while Active + 56 years, and then destroy.</i> <i>Disposition: Transfer at end of each pay year to National Personnel Records Center (NPR), St. Louis, MO. Destroy 56 years after date of last entry.</i> VITAL RECORD</p>	FTDP
FI-19-12	<p>Employee Payroll Folders</p> <p>Material relating to each employee, including personnel actions (SF-50s), W-4s, voluntary deduction authorizations, garnishment authorizations and special leave authorizations.</p> <p><i>Retention Schedule: GRS-2/15 through 2/18</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	FTDP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-19-13	<p>Bond Purchases</p> <p>Material relating to deposits and purchases of U.S. savings bonds.</p> <p><i>Retention Schedule: GRS-2/14</i> <i>Retain until superseded, then destroy</i> <i>Destroy when superceded or after separation of employee.</i></p>	FTDP
FI-19-14	<p>Payroll Processing</p> <p>Material relating to payrolls, check lists, earnings and leave reports and related certification sheets.</p> <p><i>Retention Schedule: GRS-2/22 (c)</i> <i>Retain for 3 years and then destroy.</i> VITAL RECORD</p>	FTDP
FI-19-15	<p>Payroll Processing Final Edit</p> <p>Comparative report of time-and-attendance data and payroll master record for DOE's Payroll and Personnel System (PAY/PERS).</p> <p><i>Retention Schedule: GRS-2/22(c)</i> <i>Retain for 3 years and then destroy.</i> VITAL RECORD</p>	FTDP
FI-19-16	<p>Payroll Control Registers</p> <p>Comparative report of time-and-attendance data and payroll master record for DOE's Payroll and Personnel System (PAY/PERS).</p> <p><i>Retention Schedule: GRS-2/22(c)</i> <i>Retain for 3 years and then destroy.</i> VITAL RECORD</p>	FTDP
FI-19-17	<p>Payroll Changes</p> <p>Records used to direct a change or correction of an individual pay transaction. Payroll adjustments.</p> <p><i>Retention Schedule: GRS-2/23(a)</i> <i>Retain for 3 years and then destroy.</i></p>	FTDP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-19-18	<p>Payroll Schedules</p> <p>Material relating to schedules used in the payroll process. Includes U.S. Treasury and non-Treasury schedules.</p> <p><i>Retention Schedule: GRS-2/22(c)</i> <i>Retain for 3 years and then destroy.</i></p>	FTDP
FI-19-19	<p>Payroll Administration Reports</p> <p>Material relating to statistical and narrative reports about payroll operations and pay.</p> <p><i>Retention Schedule: GRS-2/22(c)</i> <i>Retain for 3 years and then destroy.</i> VITAL RECORD</p>	FTDP
FI-19-20	<p>Taxes</p> <p>Material relating to withheld Federal taxes, such as Internal Revenue Service form W-3. Includes reports relating to income and Social Security taxes.</p> <p><i>Retention Schedule: GRS-2/13</i> <i>Retain for 4 years and then destroy.</i> VITAL RECORD</p>	FTDP
FI-19-21	<p>Retirements</p> <p>Material relating to employees' accrual of retirement credit. Includes reports, registers, and control documents. For BPA, this records series includes more data than are referenced in GRS 2/28.</p> <p><i>Retention Schedule: GRS-2/28</i> <i>Retain for 3 years and then destroy.</i> VITAL RECORD</p>	FTDP
FI-19-22	<p>Insurance, Charitable, and Other Deductions</p> <p>Material relating to health insurance, charitable and other voluntary deductions. Includes reports, vouchers and schedules.</p> <p><i>Retention Schedule: GRS-2/15(b)</i> <i>Retain for 3 years and then destroy.</i></p>	FTDP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-20	<p>Non-Treasury Financing</p> <p>Material relating to non-Treasury sources of credit, funds or other-than-traditional (alternative) sources of funds for work and services provided by BPA. (Traditional sources of funds are Treasury borrowing (FI-21-12) and revenues from power sales and wheeling agreements (FI-23)).</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain for 7 years and then destroy.</i></p>	FTC
FI-20-11	<p>Non-Treasury Financing Negotiations</p> <p>Material relating to development of BPA's financing agreements.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	FTC
FI-20-12	<p>Non-Treasury Financing Implementation</p> <p>Material accounting for BPA's financing agreements with sources other than the U.S. Treasury.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	FTC
FI-20-16	<p>Multi-District Litigation 551</p> <p>Financial material relating to securities fraud litigation arising out of the default by Energy Northwest on nuclear power projects 4 and 5. Commonly referred to as MDL 551. See also LW-29, WPPSS Litigation.</p> <p><i>Retention Schedule: N1-305-07-1-6/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	FTC
FI-20-17	<p>Reserve Fund</p> <p>Material relating to debt service reserve funds maintained for outstanding third-party financing arrangements including Energy Northwest.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	FTC

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-20-18	<p>Third-Party Debt Instruments</p> <p>Material relating to the Washington Public Power Supply System (WPPSS) and other entities about BPA's backing for third-party debt instruments.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	FTC
FI-20-19	<p>Supply System Bond Refinancing</p> <p>Material relating to the refunding program jointly pursued by Energy Northwest and BPA to refund high-interest debt with lower-interest refunding debt issues.</p> <p><i>Retention Schedule: N1-305-07-1-9/e/1</i> <i>Retain while Active + 30 years, and then destroy.</i> <i>Active period ends upon the expiration of the bond.</i></p>	FTC
FI-21	<p>Cash Management</p> <p>Material relating to overall BPA cash concerns, including short-term forecasting and dealings with the U. S. Treasury.</p> <p><i>Retention Schedule: N1-305-07-1-9/a</i> <i>Retain until superseded, then destroy</i></p>	FTC
FI-21-11	<p>Banking</p> <p>Material relating to BPA's banking, lockboxes and wire transfer arrangements.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	FTT
FI-21-12a	<p>Treasury Borrowing - Bonds</p> <p>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. See also FI-29-13, Net Debt.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends upon the expiration of the bond.</i></p>	FTT

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FI-21-12b	<p>Treasury Borrowing - Other Related Documents-</p> <p>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. See also FI-29-13, Net Debt. (b) Other related documents except those specified in (c).</p> <p><i>Retention Schedule: N1-305-07-1-9/a</i> <i>Retain until superseded, then destroy</i></p>	FTT
FI-21-12c	<p>Treasury Borrowing - Financial Planning</p> <p>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. See also FI-29-13, Net Debt. (c) Material relating to financial planning for BPA's borrowing of funds from the U. S. Treasury for work and services provided by BPA.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	FTT
FI-21-13	<p>Cash Flow</p> <p>Material relating to projections and historical data about BPA's cash position.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	FTT
FI-22a	<p>Credit Management - Collection Documents</p> <p>Material relating to BPA's debt management and collection activities. (a) Collection documents.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	FTT
FI-22b	<p>Credit Management - Other Related Documents</p> <p>Material relating to BPA's debt management and collection activities. (b) Other related documents.</p> <p><i>Retention Schedule: N1-305-07-1-9/a</i> <i>Retain until superseded, then destroy</i></p>	FTT,NSTS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-23	<p>Revenue and Receipts</p> <p>Material relating to data on BPA's revenues and receipts from all sources. Also includes material relating to issues about 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 also PM-11-19, Billings.</p> <p><i>Retention Schedule: N1-305-07-1-9/e/1</i> <i>Retain while Active + 24 years, and then destroy.</i></p>	FRG,FTT
FI-25	<p>Cost Analyses</p> <p>Material relating to the allocation and distribution of BPA's overheads and cost pools and to the rates associated with the overheads and cost pools.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain for 10 years and then destroy.</i></p>	FRS
FI-26	<p>Bonneville Enterprise System (BES)</p> <p>Material relating to all financial information on the Bonneville Enterprise System (BES). Includes manual and automated accounting, managerial, budgetary and program management information processing and reporting.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends when the 10 year cycle is complete.</i></p>	NJSH,NJSP
FI-26-11	<p>Bonneville Enterprise System (BES) Accounts Payable</p> <p>Material relating to development and installation of the BES Accounts Payable and Purchase Order system that supports the invoice approval and processing requirements of BPA's general vouchering activity.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	FTD
FI-26-12	<p>Bonneville Enterprise System (BES) Internal Controls</p> <p>Material relating to establishing standards for performing assessments, implementing improvements and providing internal and external reports related to internal control responsibilities and activities of BPA's Office of Financial Management. Includes requests for BES changes, new segment values, system development and system enhancements.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	NJSH,NJSP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-26-13	<p>Bonneville Enterprise System (BES) A-127</p> <p>Material relating to the establishment of BES objectives and standards, implementation directives and related review and assessment reports as directed by OMB Circular A-127.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	NJSH,NJSP
FI-26-15	<p>PeopleSoft (PS) General Ledger (GL)</p> <p>Material relating to development and implementation of the general ledger portion of the Bonneville Enterprise System (BES), including the GL accounts, management and control reports, budget system, budget entry, forecast versus actual reports and organizational and program hierarchies.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	NJSH,NJSP
FI-26-16	<p>ADP Resource Management Reporting System</p> <p>Material relating to development and maintenance of the subsidiary ledger system to the BES system.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	Z
FI-26-17	<p>Bonneville Enterprise System (BES) Change Control</p> <p>Material relating to requests for BES changes, new chartfield values, system development and system enhancements as recorded on form BPA 2100.05, Chartfield Work Request and BES Change Request.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	NJSH,NJSP
FI-27a	<p>Average System Cost Determination - RASA and ETCA</p> <p>(a) Material relating to the Residential Purchase and Sale Agreement (RASA) and the Exchange Transmission Credit Agreement (ETCA). Includes records about utility rate-change proceedings and Record of Decision (ROD) signed by the BPA Administrator. Average system cost (ASC) methodology documents (as outlined in 18 CFR 301) constitute a highly specialized exhibit to contracts with BPA's customers. See also LW-28-14, Average System Cost Review.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	PFE

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-27b	<p>Average System Cost Determination - Residential Exchange Program</p> <p>(b) Material in support of BPA's Residential Exchange Program. Includes reports, studies and analyses associated with ASC interpretations, exchange forecasts, utility financial and economic analyses, models, jurisdictional rate case activities, litigation and special project-related documents.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	PFE
FI-28	<p>Revenue Requirements</p> <p>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, and PM-16, Rate Filings and Hearings.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	FS
FI-29	<p>Repayment</p> <p>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 studies on the effects of FERC regulations, alternative repayment methodologies and revenue requirement analyses, studies and related documentation. See also PM-13-13, Wholesale Power Rate, PM-16, Rate Filings and Hearings and LW-28-11, BPA Rate Hearings. This record series has statutory and FERC requirements.</p> <p><i>Retention Schedule: N1-305-07-1-9/e/1</i> <i>Retain for 21 years and then destroy.</i></p>	FS
FI-29-11	<p>Separate Accounting</p> <p>Historical tracking of the revenues, expenses and Federal amortization payments of the Federal Columbia River Power System (FCRPS) separated by generation, transmission and wheeling. Separate accounting analyses are prepared consistent with the legislative requirement that BPA equitably allocate the costs of the Federal transmission system between Federal and non-Federal power users. (See FERC Order dated January 27, 1984, 26 FERC 61.096).</p> <p><i>Retention Schedule: N1-305-07-1-9/e/1</i> <i>Retain for 21 years and then destroy.</i></p>	FS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FI-29-12	<p>Replacements</p> <p>Material relating to the costs and timing of Federal Columbia River Power System (FCRPS) project replacements within BPA's repayment study, including generating projects and transmission plant.</p> <p><i>Retention Schedule: N1-305-07-1-9/e/1</i> <i>Retain for 21 years and then destroy.</i></p>	FS
FI-29-13	<p>Net Debt</p> <p>Material relating to the increase in BPA's outstanding debt with the U.S. Treasury, new borrowing less amortization paid. The records describe projected increases in BPA's net Federal debt on a planning basis. See also FI-21-12, Treasury Borrowing.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain for 7 years and then destroy.</i></p>	FTT
FI-30	<p>Trust Funds</p> <p>Material relating to the BPA management of trust funds. Material includes, but not limited to, information related to nuclear decommissioning, decontamination or site restoration. Includes investment policies and annual trustee financial statements.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active means period before the decommission/decontamination of a nuclear plant and/or completing restoration of the nuclear site.</i></p>	FTC
FI-31	<p>Fish and Wildlife Credits</p> <p>Material relating to fish and wildlife credits. Preparation of materials certifying the size of fish and wildlife credits, earned under provision 4(h)(10)(c) of the Regional Act, to be sent to DOE, Treasury and OMB.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active means as long as the provisions of the Regional Act governing BPA's fish and wildlife responsibilities are in place.</i></p>	FS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FW	<p>Fish And Wildlife</p> <p>Material relating to implementation of BPA's fish and wildlife program, including resources and policies. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
FW-24	<p>Columbia Basin Fish and Wildlife Program</p> <p>Implementation of the Northwest Power Planning Council's Columbia Basin Fish and Wildlife Program (hereinafter referred to as the Council's Program). See also EX-11-15, Publications. The final report on each BPA fish and wildlife project is issued as a BPA-numbered publication.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain for 10 years and then destroy.</i></p>	<p>KEW,KEWB, KEWL,KEWM, KEWR,KEWU, PGB</p>
FW-24-11	<p>Provincial Review & Decision Letters</p> <p>Final documents with amendments to the Council's Program.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain for 10 years and then destroy.</i></p>	<p>KEW,KEWB, KEWL,KEWM, KEWR,KEWU</p>
FW-24-12	<p>Subbasin Planning</p> <p>Material on system subbasin planning.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain for 10 years and then destroy.</i></p>	<p>KEW,KEWB, KEWL,KEWM, KEWR,KEWU, PGB</p>
FW-24-13	<p>Research Monitoring and Evaluation (RM&E)</p> <p>Material on monitoring and evaluation programs developed in response to Section 204 of the Council's Program.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain for 10 years and then destroy.</i></p>	<p>KEW,KEWB, KEWL,KEWM, KEWR,KEWU</p>

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FW-24-14	<p>Solicitation Project Proposals</p> <p>Documentation, correspondence and material related to submission of projects proposed for funding by BPA. Documents of funded or successful proposals are transferred to FW-25 when projects are formalized through contract award or other specific action. All unfunded projects remain in FW-24-14.</p> <p><i>Retention Schedule: N1-305-07-1-4/d</i> <i>Retain for 13 years and then destroy.</i></p>	KEW,KEWB, KEWL,KEWM, KEWR,KEWU
FW-25	<p>Fish and Wildlife Projects</p> <p>Material related to planning and coordination of specific projects. Significant fish and wildlife (FW) projects are those for which a contract has been awarded and for which capitalized funds are committed. Significant projects may also include those with native American tribes, historical locations, environmentally sensitive issues or unusual/innovative conservation or fish measures. See also EX-11-15, Publications. The final report of each BPA fish and wildlife (FW) project is issued as a BPA-numbered publication.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain while Active + 10 years, and then destroy.</i> <i>Active period ends upon the expiration of the contract.</i></p>	KEW,KEWB, KEWL,KEWM, KEWR,KEWU, PGB
FW-29	<p>Hydro</p> <p>Information on processes of spilling water at dams for fish passage. Information specific to the trucking and barging of fish and the facilities used for this specific type of transportation. Material on the passage survival of salmonids up/downstream through reservoirs.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain for 10 years and then destroy.</i></p>	KEW,KEWB, KEWL,KEWM, KEWR,KEWU, PGB
FW-32	<p>Water Budget</p> <p>Information on streamflows for fish and wildlife benefit.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain for 15 years and then destroy.</i></p>	KEW,KEWB, KEWL,KEWM, KEWR,KEWU, PGB

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
FW-39	<p>Wildlife - Mitigation & Planning</p> <p>Impacts to wildlife species and habitats BPA activities dealing with wildlife mitigation and enhancement actions, identification and quantification of wildlife losses and the development of mitigation plans and information on fish populations used in either fish management or mitigation and accounting of fish losses. Includes census.</p> <p><i>Retention Schedule: N1-305-07-1-12/c</i> <i>Retain for 10 years and then destroy.</i></p>	<p>KEW,KEWB, KEWL,KEWM, KEWR,KEWU</p>
FW-39-12	<p>Wildlife Agreements</p> <p>Includes loss assessments and mitigation actions.</p> <p><i>Retention Schedule: N1-305-07-1-9/e/2</i> <i>Retain for 20 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	<p>KEW,KEWB, KEWL,KEWM, KEWR,KEWU</p>

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
IR	<p>Information Resources</p> <p>Material relating to the development and implementation of policy, standards and procedures for information management activities. Includes material relating to system software and hardware, computer operations, telecommunications, office automation and library services. In this Chapter, 'ADP' means automated data processing. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
IR-11	<p>IT Program Direction</p> <p>Information that defines a strategic direction for implementation of business process automation objectives.</p> <p><i>Retention Schedule: N1-305-07-1-5/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	NJ,NJSI,NJSH, NJSP,NJSR
IR-11-11	<p>IT Policies and Guidelines</p> <p>Directives that serve to accomplish a consistent and uniform approach in establishing and managing a technology program throughout the business enterprise.</p> <p><i>Retention Schedule: N1-305-07-1-5/c</i> <i>Retain until superseded plus 10 years, and then destroy.</i></p>	NJ,NJSI,NJSR, NJST
IR-11-12	<p>IT Standards and Procedures</p> <p>Information that sets the limiting parameters from within which the computing environment must be architected and managed.</p> <p><i>Retention Schedule: N1-305-07-1-5/c</i> <i>Retain until superseded plus 10 years, and then destroy.</i></p>	NJ,NJSI,NJSC, NJSR,NJST
IR-11-13	<p>Enterprise Architecture Records</p> <p>Records identifying the IT systems and networks required to perform the agency's mission and the transitional processes required to implement comprehensive programs to support that mission. Records may include technical reference models, diagrams, graphics, models and narratives that describe the agency's baseline architecture, target architecture and related sequencing plans.</p> <p><i>Retention Schedule: GRS 27/2</i> <i>Retain until superseded plus 7 years, and then destroy.</i></p>	NJ,NJIE

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
IR-11-14	<p>Legal and Regulatory Compliance Records</p> <p>Records documenting agency compliance with Federal IRM laws and regulations including systems and reports created to support compliance with the mandates of OMB, GAO and other Federal IRM and IT oversight agencies.</p> <p><i>Retention Schedule: GRS-27/4</i> <i>Retain for 5 years and then destroy.</i></p>	NJ,NJB
IR-11-15a	<p>Oversight and Compliance Files-Performance measurements & benchmarks</p> <p>Records in offices with agency-wide or bureau-wide responsibility for managing IT operations relating to compliance with IT policies, directives and plans including recurring and special reports, responses to findings and recommendations and reports of follow-up activities. Performance measurements and benchmarks.</p> <p><i>Retention Schedule: GRS-24/1(a)</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends when all unresolved issues are closed.</i></p>	NJM
IR-11-15b	<p>Oversight and Compliance Files-all other oversight & compliance records</p> <p>(b) All other oversight and compliance records, including certification and accreditation of equipment, quality assurance reviews and reports, reports on implementation of plans, compliance reviews and data measuring or estimating impact and compliance.</p> <p><i>Retention Schedule: GRS-24/1(b)</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends when all unresolved issues are closed.</i></p>	NJM
IR-12	<p>Systems Planning</p> <p>Material relating to the preparation, maintenance and updating of information resources management plans and cost recovery systems. Includes material relating to coordinated planning efforts involving BPA and other Federal, State and local agencies.</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain for 6 years and then destroy.</i></p>	NJ,NJSC,NJSI, NJSH,NJSP, RNJSR,NJST

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
IR-12-11	<p>Information Technology (IT) Program Planning Records</p> <p>Records relating to the development of agency IT programs. Included are records that document agency-wide IT goals, specify milestones to be achieved, identify performance measures for the agency's IT portfolio or summarize the underlying principles and approach by which the agency will plan for and manage its IT resources. Records may include strategic and tactical plans documenting the implementation and maintenance of IT systems in support of the agency mission and also may include records supporting formally issued plans, such as records of concurrence, comments, clearances, justifications and other issuance records.</p> <p><i>Retention Schedule: GRS-27/1</i> <i>Retain for 7 years and then destroy.</i></p>	NJ
IR-13	<p>Technical Reviews</p> <p>Material relating to technical reviews of proposed hardware and software systems or system components. Includes such material as requirements and specifications, costs and benefits of proposed systems and justifications such as documentation for the change management authority.</p> <p><i>Retention Schedule: NI-305-07-1-18/c</i> <i>Retain for 6 years and then destroy.</i></p>	NJ,NJSH,NJSP, NJSC,NJSI, NJSR,NJST
IR-14	<p>Automated Systems Security</p> <p>Material relating to security of ADP and related information management systems. Includes such material as authorizations for computer center access, plans and procedures for physical security and security of data files and records. See also SS-18-13, Computer Security.</p> <p><i>Retention Schedule: NI-305-07-1-18/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	NJB,NJSI,NJIO, NJSH,NJSP,NJSC, NJSR,NJST
IR-15	<p>Equipment Technology & Office Automation</p> <p>Material relating to the selection, use and management of ADP hardware and office automation equipment. Includes material relating to equipment types, configurations, uses and acquisition recommendations.</p> <p><i>Retention Schedule: NI-305-07-1-18/c</i> <i>Retain for 6 years and then destroy.</i></p>	NJII,NJM,NJSI, NJSR,NJST

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
IR-16	<p>Telecommunications</p> <p>Material relating to requests 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 including cellular phones, directory listings and electronic transmission of text or data originating from ADP (including word processing) equipment. See also SS-12, Mail Services and ED-20-12, Microwave System.</p> <p><i>Retention Schedule: N1-305-07-1-18/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Active period ends 1 year after the return of the equipment.</i></p>	NJIO,NJM,TOH
IR-16a	<p>Telecommunications - Logs of Long Distance Telephone Calls</p> <p>(a) Logs of long distance telephone calls kept by some originating organizations for certifying bills. See also FI-17, Expenditure Documentation. Based on GRS 12/3(a).</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain for 1 years and then destroy.</i></p>	Z
IR-16b	<p>Telecommunications - Other Than Specific Telecommunication Function</p> <p>(b) Material other than logs relating to a specific telecommunication function, activity, person, organization, location or project.</p> <p><i>Retention Schedule: N1-305-07-1-18/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	Z
IR-17	<p>Database Management</p> <p>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.</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain for 6 years and then destroy.</i></p>	NJSR,NJST

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
IR-18a	<p>Software Development and Maintenance</p> <p>(a) Material relating to the development, maintenance and use of ADP software (computer programming). Includes material relating to the design and programming of automated systems and the use and applicability of ADP software.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	NJSH,NJSP,NJSC, NJSI,NJSR, NJST,TOS
IR-18b	<p>Software Development and Maintenance - Hardcopy Program Listings, Reports Electronic Code</p> <p>(b) Hardcopy program listings, reports and electronic code that track changes to computer applications as they are developed and updated. Current (and occasionally one older generation) hardcopy is retained.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	NJSH,NJSP,NJSC, NJSI,NJSR, NJST,TOS
IR-19	<p>Computer Operations</p> <p>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. Also includes records of maintenance performed on ADP (including telecommunications and network) equipment.</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain for 6 years and then destroy.</i></p>	NJIO,NJIT,NJSC, NJST,TOS
IR-20	<p>Liaison</p> <p>Material relating to non-BPA computer operations such as those managed 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.</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain for 6 years and then destroy.</i></p>	NJ
IR-21	<p>Computer Assistance</p> <p>Material relating to BPA's computer-related Help Desk or client support function.</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain for 6 years and then destroy.</i></p>	NJIT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
IR-21-11a	<p>IT Customer Service Files - Help Desk Information Records</p> <p>(a) Records related to providing help desk information to customers including pamphlets, responses to "Frequently Asked Questions" and other documents prepared in advance to assist customers. Based on GRS 24/10.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain until superseded plus 1 years, and then destroy.</i></p>	NJIT
IR-21-11b	<p>IT Customer Service Files - Logs and Reports</p> <p>(b) Help desk logs, reports and other files related to customer query and problem response, query monitoring and clearance, customer feedback records and related trend analysis and reporting. Based on GRS 24/10.</p> <p><i>Retention Schedule: N1-305-07-1-18/a</i> <i>Retain for 1 years and then destroy.</i> <i>Destroy/delete when 1 year old or when no longer needed for review and analysis, whichever is later.</i></p>	NJIT
IR-22	<p>Resource Proposals</p> <p>Requests for computer-related hardware and for software applications. Includes all documentation for data processing, word processing and office automation.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	NJP,NJM,NJSH, NJSP,NST,TOS
IR-22-11	<p>TBL Resource Proposals</p> <p>TBL requests for computer-related hardware or software.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	NJSR,NJST
IR-23	<p>IT Capital Projects</p> <p>Requests to seek capital funding for computer-related hardware or software applications.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	Z

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IR-23-11	<p>IT Capital Investment Records</p> <p>Records documenting the integration of IT investments with agency-wide strategic planning, budgeting, procurement and management. Records include routine and periodic reports on IT capital investments, capital asset plans, business cases for major investments, systems, acquisitions or operational assets identified in the agency's capital investment portfolio, clearance and review records.</p> <p><i>Retention Schedule: GRS-27/3</i> <i>Retain for 7 years and then destroy.</i></p>	NJ
IR-24	<p>ADP Coordination</p> <p>Material relating to providing coordinated ADP services such as service agreements.</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain for 6 years and then destroy.</i></p>	Z
IR-25	<p>Library Services</p> <p>Library Services Material relating to the ordering of any publication.</p> <p><i>Retention Schedule: N1-305-07-1-18/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	NHTL
IR-26	<p>Year 2000 (Y2K)</p> <p>Material relating to the Year 2000, common to all departments. Start of retention period is 1/1/2000.</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain for 10 years and then destroy.</i> <i>Start of retention period is 01/01/2000. Destroy in 2010.</i></p>	Z
IR-26-11	<p>Program Mangement Documentation</p> <p>Material related specifically to BPA's Y2K program.</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain for 10 years and then destroy.</i> <i>Start of retention period is 01/01/2000. Destroy in 2010.</i></p>	NJB

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IR-26-12	<p>Individual System Documentation</p> <p>Material related specifically to BPA's Y2K program. Start of retention period is 1/1/2000.</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain while Active + 10 years, and then destroy.</i> <i>Start of retention period is 01/01/2000. Destroy in 2010.</i></p>	NJB
IR-27	<p>Data Resource Management</p> <p>Material relating to the development and implementation of policy, standards and procedures for data resource management activities.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	Z
IR-27-11	<p>Electronic Data -</p> <p>Data and database backups taken at upgrade occurrences.</p> <p><i>Retention Schedule: N1-305-07-1-GRS</i> <i>Retain for 31 years and then destroy.</i></p>	NJST
IR-28	<p>Hardware Lifecycle and Maintenance</p> <p>All material relating to the functionality, evaluation and use of hardware devices, its associated components as related to functional requirements, purchase, installation, maintenance and use.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain while Active + 2 years, and then destroy.</i> <i>Active period ends when equipment is decommissioned.</i></p>	NJR
IR-29	<p>Commercial Software</p> <p>All material relating to the functionality, evaluation and use of Commercial Off-the-Shelf ADP software. Material relating to the justification, functional requirements, installation, maintenance and use of Commercial Off-the-Shelf ADP software. Includes material relating to the customization or enhancements of automated systems.</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain while Active + 6 years, and then destroy.</i></p>	NJSC,NJSH,NJSP, NJSR,NJST

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
IR-29-11	<p>License and Maintenance Agreements (Commercial Software)</p> <p>License and maintenance agreements and other associated material relating to initial purchase, subsequent patches, upgrades and intermediate and final disposal of the media.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain while Active + 2 years, and then destroy.</i> <i>Active period ends when software is retired or no longer in use.</i></p>	NJST,NST
IR-30	<p>IT Project Investment Management</p> <p>Material relating to the Agency IT Project Portfolio (PPf) management process for IT project management and funding. Includes dated Agency IT PPf files relating to Agency Prioritization Steering Committee (APSC) project status and funding decisions, project accounting and funding transfer records, IT Project Investment Management process and protocols documents, etc...</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	NJP
IR-31	<p>IT Asset Inventory Files</p> <p>Inventories of IT assets, network circuits and building or circulatory diagrams, including equipment control systems such as databases of barcodes affixed to IT physical assets. Based on GRS 24/3.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain while Active + 1 years, and then destroy.</i> <i>Active period ends upon completion of the next inventory.</i></p>	NJII
IR-31-11	<p>IT Asset and Configuration Management Files</p> <p>Records created and retained for asset management, performance and capacity management, system management, configuration and change management and planning, follow-up and impact assessment of operational networks and systems. Includes, but is not limited to: Data and detailed reports on implementation of systems, applications and modifications, application sizing, resource and demand management, documents identifying, requesting and analyzing possible changes, authorizing changes and documenting implementation of changes, documentation of software distribution and release or version management. Based on GRS 24/3.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain while Active + 1 years, and then destroy.</i> <i>Active period ends upon termination of system.</i></p>	NJII

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
IR-31-12	<p>Routine IT Maintenance Records</p> <p>Records of routine IT maintenance on the network infrastructure documenting preventative, corrective, adaptive and perfective (enhancement) maintenance actions including requests for service, work orders, service histories and related records. Based on GRS 24/3.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain while Active + 1 years, and then destroy.</i> <i>Active period ends upon termination of system.</i></p>	NJIT
IR-32-11	<p>System Tape Library Records</p> <p>Tape library records including automated files and manual records used to control the location, maintenance and disposition of magnetic media in a tape library including list of holdings and control logs. Based on GRS 24/4.</p> <p><i>Retention Schedule: N1-305-07-1-18/a</i> <i>Retain until superseded, then destroy</i></p>	NJIO
IR-32a	<p>Incremental Backup Tapes</p> <p>Incremental backup tapes maintained for potential system restoration in the event of a system failure. Based on GRS 24.4.</p> <p><i>Retention Schedule: N1-305-07-1-18/a</i> <i>Retain until superseded, then destroy</i></p>	NJIO
IR-32b	<p>Full Backup Tapes</p> <p>Full back of the system maintained for potential system restoration in the event of a system failure or other unintentional loss of data. Based on GRS 24.4.</p> <p><i>Retention Schedule: N1-305-07-1-18/a</i> <i>Retain until superseded, then destroy</i></p>	NJIO
IR-33	<p>Files Related to Maintaining the Security of Systems and Data</p> <p>System Security Plans and Disaster Recovery Plans and documents identifying IT risks and analyzing their impact, risk measurements and assessments, actions to mitigate risks, implementation of risk action plan, service test plans, test files and data. Based on GRS 24/5.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain until superseded plus 1 years, and then destroy.</i> <i>Destroy/delete 1 year after system is superseded.</i></p>	NJB

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
IR-34a	<p>Systems Requiring Special Accountability</p> <p>(a) Systems requiring special accountability, e.g., those containing information that may be needed for audit or investigative purposes and those that contain classified records. (EXCLUDES records relating to electronic signatures.) Based on GRS 24/6.</p> <p><i>Retention Schedule: N1-305-07-1-18/c</i> <i>Retain while Active + 6 years, and then destroy.</i> <i>Active period ends when user account is terminated, the password is altered, when no longer needed for investigative or security purposes, whichever is later.</i></p>	NJB
IR-34b	<p>Routine Systems</p> <p>Those systems not covered by IR-34a. Based on GRS 24.6.</p> <p><i>Retention Schedule: N1-305-07-1-18/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Active period ends when the agency determines they are no longer needed for administrative, legal, audit or other operational purposes.</i></p>	NJB
IR-35	<p>Incident Handling, Reporting, Follow-up Records</p> <p>Computer security incident handling, reporting and follow-up records. Based on GRS 24/7.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	NJB
IR-36a	<p>IT Operations Records-Workload Schedules & Reports</p> <p>(a) Workload schedules, run reports and schedules of maintenance and support activities. Based on GRS 24/8.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain for 1 years and then destroy.</i></p>	NJ,NJI,NJIT, NJIO,NJII,NJIE, NJS,NJQ,NJSR
IR-36b	<p>IT Operations Records-Problem Repors</p> <p>(b) Problem reports and related decision documents relating to the software infrastructure of the network or system. Based on GRS 24/8.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain while Active + 1 years, and then destroy.</i> <i>Active period ends after problem is resolved.</i></p>	NJ,NJI,NJS,NJQ

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
IR-36c	<p>IT Operations Records</p> <p>(c) Operation reports including measure of benchmarks, performance indicators and critical success factors, error and exception reporting, self-assessments, performance monitoring and management reports. Based on GRS 24/8.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain for 3 years and then destroy.</i></p>	NJ,NJIO,NJS, NJSI,NJQ
IR-37a	<p>Financing of IT Resources and Services - Performance Criteria Agreements</p> <p>(a) Agreements formalizing performance criteria for quantity and quality of service, including definition of responsibilities, response times and volumes, charging, integrity guarantees and non-disclosure agreements.</p> <p><i>Retention Schedule: GRS-24/9(a)</i> <i>Retain until superseded plus 3 years, and then destroy.</i> <i>Active period ends when agreement is superseded or terminated.</i></p>	NJM
IR-37b	<p>Financing of IT Resources and Services - Third-Party Services Management</p> <p>(b) Files related to managing third-party services, including records that document control measures for reviewing and monitoring contracts and procedures for determining their effectiveness and compliance.</p> <p><i>Retention Schedule: GRS-24/9(b)</i> <i>Retain until superseded plus 3 years, and then destroy.</i> <i>Active period ends when control measures or procedures are superseded or terminated.</i></p>	NJM
IR-37c	<p>Financing of IT Resources and Services - Charges & Payment Tracking Records</p> <p>(c) Records generated in IT management and service operations to identify and allocate charges and track payments for computer usage, data processing and other IT services EXCLUDING records that are part of the agency's cost accounting system.</p> <p><i>Retention Schedule: GRS-24/9(c)</i> <i>Retain for 3 years and then destroy.</i></p>	NJM

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LA	<p>Land</p> <p>Material relating to the appraisal, condemnation and acquisition of land or rights and to permits and agreements relating to the use of land. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
LA-11	<p>General Project Management</p> <p>Material relating to general project management, project plans and estimates.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain until superseded, then destroy</i></p>	TER,TERR,TERS
LA-11-11	<p>Project Plans</p> <p>Material relating to broad project plans and negotiations covering multiple segments of a transmission line project.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain until superseded, then destroy</i></p>	TER,TERR,TERS
LA-11-12	<p>Project Estimates</p> <p>Estimates prepared on a project basis showing the anticipated cost of land acquisition.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain until superseded, then destroy</i></p>	TER,TERR,TERS
LA-12	<p>Appraisal</p> <p>Material relating to the appraisal of unacquired land rights. See LA-14, Land Acquisition for approved original report.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain until superseded, then destroy</i></p>	TER,TERR,TERS
LA-13	<p>Title and Payment</p> <p>Material relating to general title and payment for land.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain until superseded, then destroy</i></p>	TER,TERR,TERS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LA-14	<p>Land Acquisition</p> <p>Case files pertaining to land acquisition for transmission line facilities. Includes original legal conveyance instruments, title policies, General Counsel's final opinion, appraisals and related data. Archival microfilm is sent to the Federal Records Center (FRC) for retention.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Records to be reviewed every 10 years and destroyed when no longer needed.</i> VITAL RECORD</p>	TER,TERR,TERS
LA-15	<p>Maintenance Trees</p> <p>Material relating to the acquisition of operations and maintenance danger trees, including vouchers. See also FI-17, Expenditure Documentation.</p> <p><i>Retention Schedule: N1-305-07-1-10/b</i> <i>Retain for 6 years and then destroy.</i> VITAL RECORD</p>	TER,TERR,TERS
LA-16	<p>Disposal and Release of Easement</p> <p>Material related to BPA and GSA policies and procedures about the disposal of land and land rights no longer needed for BPA transmission facilities.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain until superseded, then destroy</i> VITAL RECORD</p>	TER,TERR,TERS
LA-17	<p>Land Management</p> <p>Material relating to rights granted others to use BPA lands held in fee or easement. Archival microfilms are sent to the Federal Records Center (FRC) for retention.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Records to be reviewed every 10 years and destroyed when no longer needed.</i> VITAL RECORD</p>	TER,TERR,TERS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LA-17-11	<p>Outgrants</p> <p>Material relating to land use agreements about permission to use rights-of-way.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Records to be reviewed every 10 years and destroyed when no longer needed.</i> VITAL RECORD</p>	TER,TERR,TERS
LA-18	<p>Land Policies with Federal Agencies</p> <p>Material relating to land policies and agreements developed between the Bonneville Power Administration (BPA) and other Federal agencies.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Records to be reviewed every 10 years and destroyed when no longer needed.</i> VITAL RECORD</p>	TER,TERR,TERS
LA-19	<p>Land Policies with State and Local Governments</p> <p>Material relating to land policies and agreements developed between the Bonneville Power Administration (BPA) and State, local or other non-Federal governmental units.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Records to be reviewed every 10 years and destroyed when no longer needed.</i> VITAL RECORD</p>	TER,TERR,TERS
LA-20a	<p>Land Information System</p> <p>Material relating to BPA's Land Information System (LIS) (a) Hardcopy documents including correspondence, system documentation, inquiries, responses, reports, background material and updates to the LIS applications as they are developed.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain until superseded, then destroy</i> VITAL RECORD</p>	TER,TERR,TERS
LA-20b	<p>Land Information System</p> <p>Material relating to BPA's Land Information System (LIS). (b) Electronic data.</p> <p><i>Retention Schedule: N1-305-07-1-18/a</i> <i>Retain until superseded, then destroy</i> VITAL RECORD</p>	TER,TERR,TERS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LA-22	<p>Right-of-Way</p> <p>Material relating to permits and clearing during the construction of transmission lines.</p> <p><i>Retention Schedule: N1-305-07-1-10/d</i> <i>Retain while Active + 30 years, and then destroy.</i></p>	TEL,TERM,TERG
LA-23	<p>Photogrammetry</p> <p>Aerial photography materials and products relating to planning, surveying, designing, constructing and maintaining transmission facilities serving the BPA system as well as materials and products relating to non-TBL business functions serving BPA interests. Includes hardcopy base maps and electronic manuscripts.</p> <p><i>Retention Schedule: N1-305-07-1-11/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Records to be reviewed every 20 years and destroyed when no longer needed.</i></p>	TERM,TERG
LA-23-11	<p>Aerial Photographs</p> <p>Aerial photographic negative film cans, contact prints and digital files used in designing, constructing and maintaining transmission and other facilities serving the BPA system.</p> <p><i>Retention Schedule: N1-305-07-1-11/d</i> <i>Retain while Active + 20 years, and then destroy.</i></p>	TERM,TERG
LA-23-12	<p>Photogrammetric Work Requests</p> <p>Material relating to requests for photogrammetric transmission line surveys, danger tree studies, tower studies, contour maps, centerline profiles, access roads, digital data, photomaps and photomosaics, orthophotography, LIDAR and special purpose studies.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain for 5 years and then destroy.</i></p>	TERM,TERG
LA-23-13	<p>Analytical Stereoplotter Systems</p> <p>Correspondence, reports and other data about BPA's Stereoplotter systems.</p> <p><i>Retention Schedule: N1-305-07-1-18/a</i> <i>Retain until superseded, then destroy</i></p>	TERM,TERG

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LA-23-15	<p>Topographic Mapping</p> <p>Project files, both hardcopy and digital, consisting of base maps, electronic manuscripts, contact prints, film positives, survey data and documentation.</p> <p><i>Retention Schedule: N1-305-07-1-10/d</i> <i>Retain while Active + 30 years, and then destroy.</i></p>	TERM,TERG
LA-23-16	<p>Right-of-Way Clearing Study</p> <p>Documentation of photogrammetric danger tree studies and BPA clearing design. See also LA-15, Maintenance Trees.</p> <p><i>Retention Schedule: N1-305-07-1-10/b</i> <i>Retain for 3 years and then destroy.</i></p>	TERM,TERG
LA-24	<p>Survey and Mapping</p> <p>Field notes, survey data, computations and other supporting data used to create BPA's hardshell maps. Includes general documentation such as correspondence and reports about BPA's survey and mapping function.</p> <p><i>Retention Schedule: N1-305-07-1-10/d</i> <i>Retain while Active + 31 years, and then destroy.</i></p>	TERM,TERG
LA-24-11	<p>Cadastral, Location Line & Control Surveys</p> <p>Survey notes and related documents such as survey control documents, benchmark (BM) lists, point-on-tangent (POT) lists, survey adjustment records (L-lines) and coordinates used to create hardshell maps and to design transmission lines.</p> <p><i>Retention Schedule: N1-305-07-1-10/d</i> <i>Retain while Active + 100 years, and then destroy.</i> <i>Transfer to FRC facility for storage and review every 25 years. Destroyed when no longer needed after retention is met.</i></p>	TERM,TERG
LA-24-12	<p>Preliminary Lines & Topography Surveys</p> <p>Survey notes and other data on preliminary lines, profile levels, bench levels, cross sections, topography and access roads.</p> <p><i>Retention Schedule: N1-305-07-1-10/d</i> <i>Retain while Active + 30 years, and then destroy.</i></p>	TERM,TERG

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LA-24-13	<p>Tower Site Surveys</p> <p>Field survey notes and other supporting engineering data on preliminary transmission tower siting studies.</p> <p><i>Retention Schedule: N1-305-07-1-10/d</i> <i>Retain while Active + 30 years, and then destroy.</i></p>	TERM,TERG
LA-24-14	<p>Plan And Profile Hard Shell Maps</p> <p>Original computed drawings of transmission rights-of-way and facility sites showing surrounding topographic and planimetric features. Hardshell maps are a compilation of all information used to create the plan and profile maps ('engineering drawings') classified under ED-15-11 and ED-17-11.</p> <p><i>Retention Schedule: N1-305-07-1-10/d</i> <i>Retain while Active + 32 years, and then destroy.</i> <i>Transfer to FRC facility for storage and review every 25 years. Destroyed when no longer needed after retention is met.</i></p>	TERM,TERG
LA-24-15	<p>Supporting Survey Records</p> <p>Original documents about rights-of-way and related survey topics and copies of legal documents not specifically identified as cartographic or survey records which are obtained or used in the original land survey as basic data to create the hardshell maps.</p> <p><i>Retention Schedule: N1-305-07-1-10/d</i> <i>Retain while Active + 100 years, and then destroy.</i> <i>Transfer to FRC facility for storage and review every 25 years. Destroyed when no longer needed after retention is met.</i></p>	TERM,TERG
LA-25	<p>Photomaps/Photomosaics</p> <p>BPA photomaps and photomosaics including right-of photomaps, special request photomaps and facility photomaps. Photomaps for right-of-way usage will be retained according to the 3, 5, 8, or 12-year schedule as determined by the affected district field office.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Disposal not to exceed 12 years.</i></p>	TERM,TERG

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
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LA-26	Computer-Assisted Mapping	TERM,TERG
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The computer-aided drafting (CAD) or Microstation systems are automated systems that captures, stores, processes, prints and graphically displays a variety of cartographic mapping data. Its uses include producing plan and profile mile maps, site maps, cadastral maps, facility complex maps, schematic system maps, diagrams and other related cartographic products. It can be integrated with the GIS and the IPS.

Retention Schedule: N1-305-07-1-20/a

Retain while Active + 0 years, and then destroy.

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LW	<p>Law</p> <p>Material relating to interpretation of law, litigation, legislation and related activities. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
LW-15	<p>Legal Issues about Laws and Legislation</p> <p>Inquiries, responses and related documents about laws and legislative matters. Includes matters about Federal Acts that affect BPA such as the Bonneville Project Act, the Northwest Power Act, the Freedom of Information Act and the Privacy Act.</p> <p><i>Retention Schedule: N1-305-07-1-6/d</i> <i>Retain while Active + 19 years, and then destroy.</i></p>	L
LW-16	<p>General Counsel's Dealings w/Public & Private Gps</p> <p>Inquiries, responses and other records that are not project-specific and that are with other governmental agencies, public and private groups and individuals. See also LW-22-16, Public Involvement Issues about Environmental Quality.</p> <p><i>Retention Schedule: N1-305-07-1-6/d</i> <i>Retain for 16 years and then destroy.</i></p>	L
LW-17	<p>Legal Issues about Internal Management</p> <p>Inquiries and responses about issues such as conflict of interest, insurance, taxes, bankruptcies, government travel, budgetary and other financial issues except ratemaking.</p> <p><i>Retention Schedule: N1-305-07-1-6/d</i> <i>Retain for 18 years and then destroy.</i></p>	L
LW-18	<p>Legal Issues about Personnel Matters</p> <p>Material related to employee claims (other than personal injury or property damage) such as appeals and grievances. See also LW-19-12, Employee Claims. Based on GRS 1/30 (a) and (b).</p> <p><i>Retention Schedule: N1-305-07-1-6/b</i> <i>Retain while Active + 4 years, and then destroy.</i> <i>Active period ends when the case is closed.</i></p>	L

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LW-19	<p>Personal Injury and Property Damage</p> <p>Documentation of claims against the BPA for personal injuries and property damage. Based on GRS 6/10.</p> <p><i>Retention Schedule: N1-305-07-1-6/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when claim is settled.</i></p>	L,TF
LW-19-11	<p>Tort Claims</p> <p>Claims against the BPA by persons other than BPA employees. See also LW-20, Litigation and LW-27-12, Settlement of Land Claims. Based on GRS 6/10.</p> <p><i>Retention Schedule: N1-305-07-1-6/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when claim is settled.</i></p>	L
LW-19-12	<p>Employee Claims</p> <p>Claims against the BPA by BPA employees for personal injury or property damage. Based on GRS 6/10.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when claim is settled.</i></p>	L
LW-20	<p>Litigation</p> <p>Documentation of litigation (except Rates and WPPSS) including background data. See also LW-28-11, BPA Rate Hearings and LW-29-11, WPPSS Litigation.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain while Active + 34 years, and then destroy.</i> <i>Active period ends when case is settled.</i></p>	L
LW-20-11	<p>BPA Litigation</p> <p>Litigation in which BPA is a party.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain while Active + 34 years, and then destroy.</i> <i>Active period ends when case is settled.</i></p>	L

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LW-20-12	<p>Non-BPA Litigation</p> <p>Litigation in which BPA is not a party, but which has a bearing on BPA.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain while Active + 34 years, and then destroy.</i> <i>Active period ends when case is settled.</i></p>	L
LW-21	<p>Legal Issues about Conservation</p> <p>Non-litigation documentation, including background data, about BPA's Conservation Programs.</p> <p><i>Retention Schedule: N1-305-07-1-13/c/1</i> <i>Retain for 13 years and then destroy.</i></p>	L
LW-21-11	<p>BPA Conservation Programs</p> <p>Documents specifically related to legal questions about BPA's conservation programs and projects.</p> <p><i>Retention Schedule: N1-305-07-1-6/d</i> <i>Retain for 13 years and then destroy.</i></p>	L
LW-21-12	<p>Congressional Issues about Conservation</p> <p>Documentation of BPA's participation in and comments on the National Energy Policy.</p> <p><i>Retention Schedule: N1-305-07-1-13/c/1</i> <i>Retain for 13 years and then destroy.</i></p>	L
LW-22	<p>Legal Issues about Environment</p> <p>Non-litigation documentation about BPA's environmental function. Includes background data and BPA responses and opinions about Federal and relevant State and local environmental laws and regulations, such as NEPA and CERCLA.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain for 33 years and then destroy.</i></p>	L
LW-22-11	<p>BPA Responses to Environmental Policies</p> <p>BPA's responses to environmental legal questions.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain for 33 years and then destroy.</i></p>	L

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LW-22-12	<p>BPA Responses to Federal Environmental Acts</p> <p>BPA's responses to environmental laws.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i></p> <p><i>Retain for 33 years and then destroy.</i></p>	L
LW-22-13	<p>Federal Environmental Matters</p> <p>BPA's involvement with environmental legal matters with other Federal agencies.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i></p> <p><i>Retain for 33 years and then destroy.</i></p>	L
LW-22-14	<p>State & Local Environmental Matters</p> <p>BPA's involvement with environmental legal matters with State and local bodies.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i></p> <p><i>Retain for 33 years and then destroy.</i></p>	L
LW-22-15	<p>Environmental Quality Matters</p> <p>Legal issues that are not project statutes and that are not coordination related.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i></p> <p><i>Retain for 33 years and then destroy.</i></p>	L
LW-22-16	<p>Public Involvement Issues About Environmental Quality</p> <p>BPA's involvement with environmental legal matters with the public.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i></p> <p><i>Retain for 53 years and then destroy.</i></p>	L
LW-22-17	<p>Project-Related Environmental Legal Issues</p> <p>Responses to environmental questions and issues that arise about specific BPA projects.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i></p> <p><i>Retain for 33 years and then destroy.</i></p>	L

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LW-23	<p>Legal Issues about Fish and Wildlife</p> <p>Documentation of BPA's and the related Northwest Power Planning Council's Fish and Wildlife Program.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain for 28 years and then destroy.</i></p>	L
LW-23-11	<p>Fish and Wildlife Law</p> <p>Material related to legislation, legal affairs, interpretation of law, BPA rules, regulations, policies and related legal issues about fish and wildlife matters.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain for 28 years and then destroy.</i></p>	L,PGB
LW-24	<p>Legal Issues about the Power Business Line</p> <p>Material related to BPA's power sales contracts.</p> <p><i>Retention Schedule: N1-305-07-1-6/d</i> <i>Retain for 13 years and then destroy.</i></p>	L
LW-24-11	<p>Power Services</p> <p>Nonlitigative issues about specific power customers.</p> <p><i>Retention Schedule: N1-305-07-1-6/d</i> <i>Retain for 13 years and then destroy.</i></p>	L
LW-24-12	<p>Transmission Services for Power Sales</p> <p>Issues about transmission services for power sales.</p> <p><i>Retention Schedule: N1-305-07-1-6/d</i> <i>Retain for 13 years and then destroy.</i></p>	L
LW-25	<p>Legal Issues about Resource Management</p> <p>Documentation of matters about resource acquisition and about planning and operation of the power system, including BPA's resource program.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain for 38 years and then destroy.</i></p>	L

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LW-25-11	<p>Treaties with Canada</p> <p>Documentation of treaties and other agreements with Canada. See also RP-16-13, Agreements.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/2</i> <i>Retain for 20 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	L
LW-26	<p>Legal Issues about Contracting</p> <p>Nonlitigation, nonproprietary documentation including background data about contracting.</p> <p><i>Retention Schedule: N1-305-07-1-6/d</i> <i>Retain for 13 years and then destroy.</i></p>	L
LW-26-11	<p>Procurement Matters</p> <p>Nonlitigation, nonproprietary documentation about contracts for goods and services, including construction.</p> <p><i>Retention Schedule: N1-305-07-1-6/d</i> <i>Retain for 13 years and then destroy.</i></p>	L
LW-26-12	<p>Contracting Other Than Procurement</p> <p>Material relating to general issues about contractual authority and contractual issues involved in resource acquisitions.</p> <p><i>Retention Schedule: N1-305-07-1-6/d</i> <i>Retain for 13 years and then destroy.</i></p>	L
LW-26-13	<p>Intellectual Property</p> <p>Legal material relating to patents, copyrights and trademarks. Includes technical data.</p> <p><i>Retention Schedule: N1-305-07-1-6/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends upon expiration of the relevant patent, copyright, trademark or other law.</i></p>	Z

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LW-27	<p>Legal Issues about Land Rights</p> <p>Legal issues about land rights inquiries, responses and related documents about BPA's land rights.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain for 34 years and then destroy.</i></p>	L
LW-27-11	<p>Acquisition and Management of Land Rights</p> <p>Matters about the process of acquisition and management of land for BPA's use. See also LA-14, Land Acquisition and LA-17, Land Management.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain while Active + 34 years, and then destroy.</i></p>	L
LW-27-12a	<p>Settlement of Land Claims - Less Than \$500</p> <p>Authority vested through the Boneville Project Act in specific BPA managers to settle claims against the BPA for BPA's damage to private property. Claims in excess of \$1,000 are handled as tort claims. See also LW-19-11, Tort Claims.</p> <p><i>Retention Schedule: N1-305-07-1-6/b</i> <i>Retain for 5 years and then destroy.</i></p>	TER
LW-27-12b	<p>Settlement of Land Claims - \$500 to \$1,000</p> <p>Authority vested through the Bonneville Project Act in specific BPA managers to settle claims against the BPA for BPA's damage to private property. Claims in excess of \$1,000 are handled as tort claims. See also LW-19-11, Tort Claims. Documentation is included in LA-14, Land Acquisition.</p> <p><i>Retention Schedule: N1-305-07-1-6/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Transfer to FRC facility. Review every 10 years and destroy when no longer needed.</i></p>	TER, TERR, TE RS
LW-28	<p>Legal Issues about BPA Ratemaking</p> <p>Legal analysis, interpretation and justification supporting BPA-formulated charges for the sale or disposition of electric energy and capacity and the provision of transmission services.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain while Active + 35 years, and then destroy.</i> <i>Active period ends when ratemaking case is closed.</i></p>	L

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LW-28-11	<p>BPA Rate Hearings</p> <p>The formal evidentiary record, including public comments, compiled during the course of hearings conducted before the BPA Administrator pursuant to Section 7(i) of the Northwest Power Act, 16 USC 839(i). Includes discrete rates of limited application as well a general rate adjustments involving BPA wholesale power and transmission rates. Includes litigation documentation about rate cases. See also PM-16, Rate Filings and Hearings.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/2</i> <i>Retain while Active + 30 years, and then destroy.</i> <i>Active period ends when ratemaking case is closed. NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	L
LW-28-12	<p>Federal Energy Regulatory Commission Review</p> <p>The formal evidentiary records of the Federal Energy Regulatory Commission (FERC) review of BPA's rates pursuant to Section 7(i)(6) and Section 7(k) of the Northwest Power Act, 16 USC 839(e)(6) and 839e(k) and the FERC's regulations for Federal Power Marketing Administration, 18 CFR 300.a.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain while Active + 35 years, and then destroy.</i> <i>Active period ends when ratemaking case is closed.</i></p>	L
LW-28-13	<p>Courts' Review</p> <p>All materials considered by various courts in formation review of BPA's rates. Includes the formal evidentiary record of prior proceedings before the BPA Administrator and the FERC as well as all legal pleadings, briefs and orders of the Court. Customarily, review is through U.S. Circuit Court of Appeals, U.S. Claims Court or the Supreme Court of the United States.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain while Active + 35 years, and then destroy.</i> <i>Active period ends when ratemaking case is closed.</i></p>	L
LW-28-14	<p>Average System Cost Review</p> <p>Materials involving BPA purchases and sales under Section 5(c) of the Northwest Power Act, 16 USC 839c(c) determined under the Average System Cost Methodology, records of Average Cost Methodology consultation processes, materials from state retail rate case interventions and other secondary sources. See also FI-27, Average System Cost Determination.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain while Active + 35 years, and then destroy.</i> <i>Active period ends when ratemaking case is closed.</i></p>	L

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LW-28-15	<p>General Power Rates Development</p> <p>Materials involved in the development of wholesale power rate proposals. Includes issue papers, analyses and comments.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain while Active + 35 years, and then destroy.</i> <i>Active period ends when ratemaking case is closed.</i></p>	L
LW-28-16	<p>General Transmission Rates Development</p> <p>Materials involved in the development of transmission rate proposals. Includes issue papers, analyses and comments.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain while Active + 35 years, and then destroy.</i> <i>Active period ends when ratemaking case is closed.</i></p>	L
LW-28-17	<p>Ratemaking Repayment</p> <p>Materials relating to financial issues involving project amortization, Treasury repayment, revenue requirements, separate accounting and other financial goals and practices related to BPA ratemaking. Includes legal interpretations of BPA fiscal and accounting practices. See also FI-28, Revenue Requirements and FI-29, Repayment.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/1</i> <i>Retain while Active + 35 years, and then destroy.</i> <i>Active period ends when ratemaking case is closed.</i></p>	L
LW-29	<p>Legal Issues about WPPSS</p> <p>Material relating to legal issues between the BPA and the Washington Public Power Supply System (WPPSS), specifically their development of nuclear power projects (WNP).</p> <p><i>Retention Schedule: N1-305-07-1-6/e/2</i> <i>Retain for 8 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	L
LW-29-11	<p>WPPSS Litigation</p> <p>Litigation about BPA's dealings with Washington Public Power Supply System nuclear projects. See also FI-20-16, Multi-district Litigation 551.</p> <p><i>Retention Schedule: N1-305-07-1-6/e/2</i> <i>Retain while Active + 4 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	L

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
LW-30	Legal Issues about Transmission Services Material related to BPA's Transmission contracts. <i>Retention Schedule: N1-305-07-1-6/d</i> <i>Retain for 13 years and then destroy.</i>	L

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**FILE GUIDE AND RETENTION SCHEDULE: MAINTENANCE
CONSTRUCTION**

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
MA	<p>Maintenance And Construction</p> <p>Material relating to the maintenance of the power system. All records in this chapter are scheduled in medai neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
MA-11	<p>Substation Maintenance</p> <p>Material and drawings relating to maintenance and construction of specific substations. Includes data about substation equipment and its performance. See also ED-17, Stations and ED-17-12, Station Design.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Active period ends when related equipment is disposed.</i></p>	<p>TEL,TELD,TELF, TELS,TESF, TESM,TET,TETC, TETD,TFCE, TFDE,TFDJ,TFH, TFI,TFK,TFKE, TFKJ,TFNE, TFNO,TFOE,TFOY, TFP,TFPE,TFPJ, TFPO,TFS,TFR, TFV,TFWE</p>
MA-11-12a	<p>Substation Equipment and Materials - Material Used for Maintenance</p> <p>(a) Material relating to the equipment and material used for the maintenance of substations and non-electric plants, except as specified under (b) below. Also used for equipment performance and failure. See also ED-17-14, High Voltage Equipment.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Destroy when related equipment is disposed.</i></p>	<p>TELS,TESF,TESM, TFCE,TFDE, TFDJ,TFI,TFKE, TFKJ,TFNE,TFNO, TFOE,TFOY, TFPE,TFPJ, TFPO,TFR,TFS, TFV,TFWE</p>
MA-11-12b	<p>Substation Equipment and Materials - Voltage and Transformer Temperature</p> <p>(b) Voltage and transformer temperature (including top oil and hot spot) chart recordings.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	<p>TELS,TESF,TESM, TFCE,TFDB, TFDE,TFDG, TFDJ,TFI,TFKB, TFKE,TFKJ,TFNE, TFNO,TFOE, TFOY,TFOB, TFOE,TFOY,TFPE, TFPJ,TFPO,TFR, TFS,TFV,TFWE</p>

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
MA-12	<p>Transmission Line Maintenance</p> <p>Material relating to the maintenance and construction of transmission lines such as equipment used, wood poles, towers, materials and line upgrades. See also ED-15, Transmission Lines and ED-15-12, Construction Data Books.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 5 years and then destroy.</i></p>	<p>TESF, TFCF, TFD, TFI, TFKF, TFNF, TFOF, TFOK, TFPP, TFR, TFS, TFV, TFWF, TFWK</p>
MA-12-11	<p>Right-of-Way Maintenance</p> <p>Material relating to the maintenance of rights-of-way including access roads, encroachments, vegetation management and clearing. See also LA-15, Maintenance Trees and LA-22, Right-of-Way.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	<p>TFBV, TFCF, TFDF, TFI, TFKF, TFNF, TFO, TFPP, TFR, TFS, TFV, TFWF, TFWK</p>
MA-12-12	<p>Wood Poles</p> <p>Documents about the maintenance of wooden transmission line poles and wooden stubs. Includes storage, preservation and disposal issues. See also ED-15-15, Structures and Towers.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	<p>TEL, TELD, TELM, TELS, TFCF, TFDF, TFE, TFI, TFL, TFKF, TFNF, TFOF, TFOK, TFPP, TFR, TFS, TFV, TFWF, TFWK</p>
MA-12-13	<p>Non-wood Poles</p> <p>Documents about transmission line poles and stubs constructed of material other than wood, such as steel, concrete and laminates. See also ED-15-15, Structures and Towers.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	<p>TEL, TELD, TELM, TELS, TESH, TFCF, TFDF, TFE, TFKF, TFL, TFNF, TFOF, TFOK, TFPP, TFR, TFS, TFV, TFWF, TFWK</p>
MA-12-14	<p>TLM Equipment and Materials</p> <p>Documentation of equipment and materials used in the maintenance of transmission line maintenance facilities. See also ED-31, Building Facilities Design and Construction Support and ED-32, Structural Engineering, Analysis and Design.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	<p>TEL, TELM, TESH, TFCF, TFDF, TFE, TFI, TFKF, TFL, TFNF, TFOF, TFOK, TFPP, TFR, TFS, TFV, TFWF, TFWK</p>

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
MA-13	<p>Power System Control Communications</p> <p>Material relating to the planning, programming, testing and maintenance of the PSC function of the electrical and nonelectrical facilities. Includes general equipment files that are not specific to a brand or location. See also ED-17-15, Substation Data Systems.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	<p>TEC,TECM,TECP, TECT,TFDC, TFCC,TFKC,TFL, TFOC,TFPH, TFPM,TFS,TFE, TFNC,TFR,TFI, TFV,TFWC, TPM</p>
MA-13-11	<p>PSC Communications Equipment</p> <p>Material relating to equipment specific to support the PSC program to a particular budget or account number. See also ED-17-15, Substation Data Systems.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	<p>TEC,TECM,TECP, TECT,TFCC, TFDC,TFK,TFL, TFOC,TFPH, TFPM,TFS,TFE, TFNC,TFR,TFV, TFWC</p>
MA-14	<p>System Protection and Control</p> <p>Material relating to the planning, programming, testing and maintenance for the SPC function or the electrical and nonelectrical facilities.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 2 years, and then destroy.</i></p>	<p>TEC,TECC,TECR, TECS,TET,TETC, TETD,TFCD, TFDD,TFDI, TFKD,TFKI,TFL, TFOD,TFON, TFPC,TFPD,TFPI, TFS,TFE,TFND, TFR,TFI,TFV, TFWD</p>
MA-14-11	<p>SPC Equipment</p> <p>Material relating to System Protection and Control.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 2 years, and then destroy.</i></p>	<p>TEC,TECC,TECR, TECS,TFCD, TFDD,TFDI,TFKD, TFKI,TFL,TFOD, TFON,TFPC, TFPD,TFPI,TFS, TFE,TFOD,TFND, TFR,TFV,TFWD</p>

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
MA-16	<p>Maintenance Improvement and Efficiency Activities</p> <p>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.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	<p>TEC,TECC, TECR,TECS, TESM,TFB,TFI</p>
MA-16-12	<p>Maintenance VerTeam Studies</p> <p>Studies by the Vertical Teams about specific subjects related to the power system.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TF
MA-16-13	<p>Performance Level Guides</p> <p>Guidelines (PLGs) for performing maintenance on power system equipment. Includes multi-year statistics, intervals for routine and preventive maintenance data, technical data, procedures, schedules and recommendations.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	<p>TELM,TESF, TESM,TFI</p>
MA-17	<p>BPA Work Standards, Guides, and SPIFs</p> <p>Material relating to the standards, procedures, instructions and information (SPIFs) for maintaining the power system. Includes indirect maintenance subjects such as grounding and removal of storage tanks.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	<p>TEC,TECC,TECM, TECP,TECR, TECS,TECT, TEL,TELD,TELM, TELS,TESF, TESM,TET,TETC</p>
MA-19	<p>Construction Interties</p> <p>Material relating to the construction of transmission lines serving to interconnect geographically distinct systems. See also ED-14, Interties and Interconnections and ED-15-26, Construction Specifications.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	<p>TELS,TESD,TESF, TFC,TFD,TFK, TFKB,TFKC, TFKD,TFKE,TFKF, TFKI,TFKJ, TFKV,TFKZ,TFL, TFO,TFP,TFS, TFE,TFN,TFR, TFV,TFW</p>

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**FILE GUIDE AND RETENTION SCHEDULE: MAINTENANCE
CONSTRUCTION**

Last Revision Date: March 18, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
MA-20	<p>Power System Construction</p> <p>Material relating to the actual on-site construction of the power system. Includes daily progress reports, diaries, correction memos and similar documents. See also ED-18, System Construction.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TFH
MA-20-11	<p>Construction Fiber Optics</p> <p>Material relating to construction of fiber optics throughout BPA's power system. See also ED-15-26, Construction Specifications and ED-20-13, Fiber Optics.</p> <p><i>Retention Schedule: N1-305-07-1-11/c</i> <i>Retain for 8 years and then destroy.</i></p>	TEC,TECM,TECP, TECT,TEL, TELD,TELM, TELP,TELS,TET, TETC

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FILE GUIDE AND RETENTION SCHEDULE: MANAGEMENT

Last Revision Date: September 9, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
MN	<p>Management</p> <p>Records accumulated by individual organizations that relate to internal administrative activities rather than the functions for which the organization exists. In general, these records relate to the office organization, staffing, procedures and communications, including facsimile machine logs, the expenditure of funds, including budget records, day-to-day administration of office personnel including training, travel, vacation coverage, designations of acting managers, retirement letters, membership requests, supplies and office services and equipment requests and receipts and the use of office space and utilities. They may also include copies of internal activity, minutes and reports of staff and committee meetings and workload reports (including work progress, statistical and narrative reports prepared in the office and forwarded to higher levels) and other materials that do not serve as unique documentation of the programs of the office. See MN-22 for Delegations of Authority. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: NI-305-07-1-5/b</i> <i>Retain for 3 years and then destroy.</i></p>	Z
MN-11a	<p>Organization</p> <p>(a) Reorganizational proposals and packages.</p> <p><i>Retention Schedule: NI-305-07-1-5/d</i> <i>Retain while Active + 25 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	NHQ
MN-11b	<p>Organization</p> <p>(b) Organizational charts.</p> <p><i>Retention Schedule: NI-305-07-1-5/d</i> <i>Retain while Active + 25 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	NHQ
MN-12	<p>Position Management</p> <p>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.</p> <p><i>Retention Schedule: NI-305-07-1-7/d</i> <i>Retain for 25 years and then destroy.</i></p>	FTD,NHQ

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
MN-13	<p>Activity Reports</p> <p>Periodic reports of work in progress reflecting activities, status and accomplishments.</p> <p><i>Retention Schedule: NI-305-07-1-5/b</i> <i>Retain for 3 years and then destroy.</i></p>	Z
MN-14a	<p>Manuals/Handbooks</p> <p>Formal directives distributed as circulars, handbooks or in manual form announcing changes to BPA policies and procedures. (a) Issuances and background material related to BPA program functions.</p> <p><i>Retention Schedule: NI-305-07-1-5/d</i> <i>Retain while Active + 25 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	Z
MN-14b	<p>Manuals/Handbooks</p> <p>(b) Issuances and background material related to such administrative functions as travel, procurement and budget.</p> <p><i>Retention Schedule: GRS-16/1(a)</i> <i>Retain until superseded, then destroy</i></p>	Z
MN-15	<p>Long Range Goals and Strategic Choices</p> <p>Material relating to multiyear program direction and plans, including their development and implementation. Includes intra-agency memorandums of understanding (MoUs) and memorandums of agreement (MoA) unless filed by function or subject as specialized correspondence.</p> <p><i>Retention Schedule: NI-305-07-1-5/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	Z
MN-15-11	<p>Annual Management Plan</p> <p>Records pertaining to the manner in which specific BPA organizations propose to implement BPA's strategic choices and objectives in a given period. This Plan is submitted yearly to the Department of Energy.</p> <p><i>Retention Schedule: NI-305-07-1-5/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	SP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
MN-16-11a	<p data-bbox="391 363 548 384">A-76 Review</p> <p data-bbox="391 411 1219 499">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 accordance with OMB Circular A-76 and DOE Order 4510.1.</p> <p data-bbox="391 516 938 604"><i>Retention Schedule: GRS-3/18(a)</i> <i>Retain while Active + 10 years, and then destroy.</i> <i>Active period ends upon completion of study.</i></p>	NHI
MN-16-11b	<p data-bbox="391 678 548 699">A-76 Review</p> <p data-bbox="391 726 1219 814">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 accordance with OMB Circular A-76 and DOE Order 4510.1.</p> <p data-bbox="391 831 938 919"><i>Retention Schedule: GRS-3/18(b)</i> <i>Retain while Active + 2 years, and then destroy.</i> <i>Active period ends upon completion of study.</i></p>	Z
MN-16a	<p data-bbox="391 993 764 1014">Management Analyses/Studies -</p> <p data-bbox="391 1041 1247 1098">Management improvement, evaluation and cost-reduction activities. Does NOT include inspections and audits. (a) Final Report.</p> <p data-bbox="391 1115 1101 1203"><i>Retention Schedule: NI-305-07-1-5/d</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	DG,DGP,NHI SP
MN-16b	<p data-bbox="391 1276 764 1297">Management Analyses/Studies -</p> <p data-bbox="391 1325 1247 1381">Management improvement, evaluation and cost-reduction activities. Does NOT include inspections and audits. (b) Working papers.</p> <p data-bbox="391 1398 813 1451"><i>Retention Schedule: NI-305-07-1-5/b</i> <i>Retain for 5 years and then destroy.</i></p>	TSS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
MN-17	<p>Audits</p> <p>Official examinations, verifications and reviews of financial and program records and accounts. Material relating to investigations of known or alleged fraud, abuse and irregularities or violations of laws and regulations. Cases relate to agency programs and operations administered or financed by the agency, including contractors and others having a relationship with the agency. Case files are developed during the investigation and consist of investigative reports and related documents, such as correspondence, notes, attachments and background and working files. Investigative cases files containing information or allegations which warrant a specific investigation may result in prosecutive or administrative action.</p> <p><i>Retention Schedule: NI-305-07-1-5/c</i> <i>Retain for 8 years and then destroy.</i></p>	DN,DNG,DNP DNT,NJB,L
MN-17-11	<p>Audits by BPA</p> <p>Material relating to pending and completed audits or reviews and results of planning surveys and audits which result in no reportable findings.</p> <p><i>Retention Schedule: NI-305-07-1-5/c</i> <i>Retain for 8 years and then destroy.</i></p>	DGP,DN,DNG, DNP,DNT
MN-17-12	<p>Audits by Department of Energy (DOE)</p> <p>Material relating to Internal Audit's function as point of contact for handling DOE matters. See also MN-17-18, Audits by Inspector General.</p> <p><i>Retention Schedule: NI-305-07-1-5/c</i> <i>Retain for 8 years and then destroy.</i></p>	DN,DNG,DNP DNT
MN-17-13	<p>Audits by General Accounting Office (GAO)</p> <p>Material relating to Internal Audit's function as point of contact for handling Government Accounting Office (GAO) matters. Includes material about DOE's position on GAO reports.</p> <p><i>Retention Schedule: NI-305-07-1-5/c</i> <i>Retain for 8 years and then destroy.</i></p>	DN,DNG,DNP DNT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
MN-17-16	<p>DOE Audit Report Tracking System</p> <p>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 Follow up.</p> <p><i>Retention Schedule: N1-305-07-1-5/c</i> <i>Retain for 8 years and then destroy.</i></p>	DN,DNG,DNP DNT
MN-17-18	<p>Audits by Inspector General</p> <p>Material relating to BPA's Internal Audit's function as point of contact for handling Inspector General (IG) matters. Includes material on Inspector General's audits of BPA.</p> <p><i>Retention Schedule: N1-305-07-1-5/c</i> <i>Retain for 8 years and then destroy.</i></p>	DN,DNG,DNP DNT
MN-18	<p>Productivity</p> <p>Material relating to BPA's attempt to link its products and services directly to the consumption of resources used to create those products. Includes BPA's response to OMB Circular A-11.</p> <p><i>Retention Schedule: N1-305-07-1-5/b</i> <i>Retain for 6 years and then destroy.</i></p>	Z
MN-20	<p>Technology and Innovation</p> <p>Material relating to policy and procedures and strategy delineating how BPA researches, develops, demonstrates and deploys new technology. Includes Research and Development (R and D), technical road mapping, tracking and forecasting, white papers and seminar announcements.</p> <p><i>Retention Schedule: N1-305-07-1-5/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends when new technology project is considered or abandoned.</i></p>	ST
MN-21	<p>Program-level Policy, Governance, Practices and Procedures</p> <p>Data and documents recording program-level policy, practices and procedures development. This includes, but is not limited to, agency-wide standard contract provisions and matrix.</p> <p><i>Retention Schedule: N1-305-07-1-5/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	DG,DGC,DGF, DGP,KS,KSB, KSC,KSK,KSL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
MN-22a	<p data-bbox="391 363 781 384">Internal Delegations of Authority</p> <p data-bbox="391 411 1235 558">Written authorizations from the BPA Administrator granting BPA officials the authority to bind the Agency. Records include individual, standing, interim, line of succession and rescinded Delegations of Authority. See MN-1 for temporary administrative assignments such as vacation coverage and designation of acting managers.</p> <p data-bbox="391 579 927 636"><i>Retention Schedule: NI-305-07-1-5/b</i> <i>Retain while Active + 6 years, and then destroy.</i></p>	KSC
MN-22b	<p data-bbox="391 709 781 730">External Delegations of Authority</p> <p data-bbox="391 758 1219 842">Written authorizations from outside the Agency granting BPA authority to implement, undertake or activate programs normally retained by the granting agency.</p> <p data-bbox="391 863 927 919"><i>Retention Schedule: NI-305-07-1-5/b</i> <i>Retain while Active + 6 years, and then destroy.</i></p>	DGC
MN-22c	<p data-bbox="391 993 821 1014">Re-delegations of Authority-Internal</p> <p data-bbox="391 1041 1243 1283">Written authorizations under BPAM Chapter 20 from BPA officials re-delegating authorities delegated to them by the Administrator to bind the Agency. These include Supply Chain delegation memos and Certificates of Appointment (Warrants) for Contracting Officers. These also cover delegation memos for Real Property, Power, Conservation, Transmission, Columbia Grid, Insurance, Financial, and Energy Efficiency contracts and agreements. See MN-1 for temporary administrative assignments such as vacation coverage and designation of acting managers.</p> <p data-bbox="391 1304 927 1356"><i>Retention Schedule: NI-305-07-1-5/b</i> <i>Retain while Active + 6 years, and then destroy.</i></p>	DGP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP	<p>Operations</p> <p>Material relating to the operations of the power transmission system. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
OP-11	<p>Dispatch</p> <p>Official records of dispatcher actions taken, conversations recorded and procedures.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TOD,TOV
OP-11-11	<p>Logs</p> <p>A chronological record of the operations of BPA's electrical system. Includes information on switching operations, clearances, weather data, Federal plant loading, line and substation equipment trouble.</p> <p><i>Retention Schedule: N1-305-07-1-4/d</i> <i>Retain while Active + 28 years, and then destroy.</i> <i>Retain for 28 years after the records are closed or for 10 years after plant is retired, whichever is longer (FERC 124.2(n)(5)).</i></p>	TOD,TOH,TOT,TOV,TOZ
OP-11-12a	<p>Recordings</p> <p>Tape recordings of dispatchers' official communications by telephone. Recordings of major system trouble, accidents and other unusual conditions.</p> <p><i>Retention Schedule: N1-305-07-1-4/d</i> <i>Retain for 25 years and then destroy.</i></p>	TOD,TOH,TOV
OP-11-12b	<p>Recordings</p> <p>Tape recordings of dispatchers' official communications by telephone. Recordings other than those of major system trouble, accidents and other unusual conditions.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 2 years and then destroy.</i> <i>Reuse when 2 years old.</i></p>	TOD,TOH,TOV

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-11-13	<p>Daily Interruption Reports</p> <p>Reports of interruptions to customer's service, interruptions in lines, faulty operation of electrical equipment, system weather conditions and other unusual conditions. Records dating back to 1985 are kept electronically. Earlier data is recorded on hard copy for analysis and on magnetic tape as a working file for analysis; data are recorded on microfilm (COM) as the official record.</p> <p><i>Retention Schedule: N1-305-07-1-4/d</i> <i>Retain for 28 years and then destroy.</i> <i>Retain in office for 3 years, store for 25 years thereafter or for 10 years after plant is retired, whichever is longer (FERC 125.2(n)(5)).</i></p>	TOT
OP-11-14	<p>Standing Orders</p> <p>Dispatcher guides for special operating conditions.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain until superseded plus 10 years, and then destroy.</i></p>	TOD
OP-11-15	<p>Loop Flow Curtailment Procedures</p> <p>Records, including but not limited to procedures and Dispatcher Standing Orders (DSO's) documenting guidance to mitigate Western interconnecting line overloads due to unscheduled power transfers.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TOT
OP-12	<p>Outages</p> <p>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.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 3 years and then destroy.</i></p>	TFE,TFI,TOV
OP-12-11	<p>Planned Outages</p> <p>Computer-generated reports.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 3 years and then destroy.</i></p>	TOV

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-12-13	<p>Applications for Outages</p> <p>Requests to the Outage Dispatcher to remove energized equipment from service to perform necessary line work. See also OP-19, Tests.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 3 years and then destroy.</i></p>	TOV
OP-13	<p>Operation of Interties and Interconnections</p> <p>Material relating to operating interties and interconnections. See also ED-14, Interties.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TOD
OP-13-11	<p>Interchange Schedules, Logs, and Outages</p> <p>All schedules, logs, outages and similar material related to the operation of all interties and interconnections. Records constitute life study data for the BPA electrical system.</p> <p><i>Retention Schedule: N1-305-07-1-4/d</i> <i>Retain for 10 years and then destroy.</i></p>	PGS,PTK,TFE, TOZ
OP-14	<p>Joint Operating and Coordination Agreements</p> <p>Agreements with other utilities and generating companies about clearance procedures, coordination of work, scheduling practices and performing reciprocal work during emergencies. See also EX-15-16, Utility Organizations and EX-15-17, Industries.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	TECS
OP-15	<p>Security Application Programs</p> <p>Material relating to on-line control computer programs that assess current state of the power system.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TECS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-15-11	<p>Voltage Control</p> <p>Material relating to on-line control computer programs that assess current state of the power system.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	TOT
OP-15-12	<p>Power Flow</p> <p>Power Flow Material relating to system requirements and design details.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 10 years and then destroy.</i></p>	TOT
OP-15-13	<p>Contingency Selection - Fast Outage Program</p> <p>Material relating to requirements to interface to bus forecast and outage schedule program.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	TOT
OP-15-14	<p>Stability - Transient Energy Function</p> <p>Material relating to research and development project for direct stability analysis.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TOT
OP-16	<p>Stability Control Schemes</p> <p>Also known as Special Protection Schemes by Western Energy Coordinating Council (WECC) and North American Electric Reliability Council (NERC). The schemes control dynamic energy imbalances when sudden changes in generation or transmission separations occur. See also ED-24, Remedial Action Schemes.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-16-11	<p>Under-Frequency Load Shed/Load Dropping</p> <p>A NWPP-coordinated program. Includes Area correspondence to identify customer load to drop.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-16-14	<p>Pacific Intertie Stability Control Schemes</p> <p>Material relating to AC intertie import stability conditions and trips industrial load.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-16-15	<p>Open Loop Operation</p> <p>Variation of OP-16-14 for direct current (DC) intertie operations when 500-kV system is open in Los Angeles area.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-16-16	<p>Stability Control Intertie Monitor</p> <p>Variation of OP-16-14 for stability control intertie monitor (SCIM). New controller to replace Grizzly Substation control/logic scheme.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-16-18	<p>Boundary & BC Hydro Schemes</p> <p>Material relating to controls to maximize Seattle City Light (SCL) Boundary generation on three Boundary Bell 230 kV lines.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-16-19	<p>Chief Joseph Brake</p> <p>Material relating to several special conditions which require mitigation of more complex controls.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-16-20	<p>Lower Snake/Grand Coulee Line Loss Schemes</p> <p>Material relating to local controls to prevent instability for multiple contingencies.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-16-21	<p>Western Montana Remedial Action Schemes (RAS)</p> <p>Material relating to transmission and generation constraints to maximize Colstrip transfers.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-16-22	<p>Bellingham Area Load Trip Scheme</p> <p>Material relating to the Bellingham area load trip scheme (BALTS). Local scheme to account for contingencies in Canada and PSPL line outages.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-16-23	<p>N-I 5 (North of Interstate 5) Puget Sound Voltage Stability Control Scheme</p> <p>Material relating to the control scheme to prevent voltage collapse in the Puget Sound Area.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-16-24	<p>Under-voltage Loadshedding/Load Tripping</p> <p>Material relating to relays set to trip load when voltage goes below set points and material relating to automatic load shedding for overloads and reserve contingencies.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-17	<p>System Restoration</p> <p>A plan to restore service after local or regional blackouts.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-17-11	<p>Remote Synchronization Scheme</p> <p>Material relating to aid to quickly synchronize islanded area via Supervisory Control and Data Acquisition (SCADA).</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-17-12	<p>Dead Bus Clearing Scheme</p> <p>Material relating to aid to quickly clear a transmission path between generation and load via SCADA.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-17-13	<p>System Restoration Tests and Training</p> <p>Material relating to practice procedures of skills needed for blackout restoration.</p> <p><i>Retention Schedule: N1-305-07-1-4/d</i> <i>Retain for 20 years and then destroy.</i></p>	TOT
OP-18	<p>Substations</p> <p>Material relating to operation of each substation.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TFCB,TFDB,TFDG, TFE,TFI,TFKB, TFL,TFNB,TFOB, TFPB,TFPG, TFR,TFSB,TFV, TFWB,TOZ
OP-18-15	<p>Gas Insulated Substation</p> <p>General guidance on special operating, maintenance and alarm requirements of gas-insulated substations (GIS).</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TESM
OP-18-16	<p>Annunciators</p> <p>General guidance on alarm requirements.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TECS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-19	<p>Tests</p> <p>Material relating to tests of BPA equipment. See also OP-12-13, Applications for Outages, ED-12-15, System Tests and ED-18-11, Test Data.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TFE,TFL
OP-19-11	<p>Fault Tests</p> <p>Records documenting planned tests to verify new equipment performance.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TECC,TECS, TESM
OP-19-12	<p>Switching Tests</p> <p>Material relating to visible arcs and improperly applied switches.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TESM
OP-19-13	<p>Transformer Tests</p> <p>Material relating to phasing checks, soaking and test energization procedures.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TESM
OP-19-14	<p>Fast Power Change Tests</p> <p>Material relating to stability controls on high voltage direct current terminal.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TESM
OP-19-15	<p>Startup Tests</p> <p>Material relating to tests on new equipment.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TESM

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-19-16	<p>110-kV Tests</p> <p>Material relating to insulation level checks.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TESM
OP-19-18	<p>Series Capacitor Tests</p> <p>Material relating to equipment performance and switching capability.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TESM,TOT
OP-19-19	<p>Northwest Power Pool (NWPP) Tests</p> <p>Material relating to tests of the northwest power system, including power and reactive levels.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TECC,TESM, TOT
OP-20	<p>Voltage & Loads</p> <p>Equipment needs, usage studies and reports and monitoring requirements.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 3 years and then destroy.</i></p>	TESM
OP-20-11	<p>Capacitors</p> <p>Material relating to rating needs for various voltage applications.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TESM
OP-20-14	<p>Voltage Schedules</p> <p>Annual studies and requirements for station and generation profiles coordinated with Northwest Power Pool (NWPP) criteria.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TOT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-20-15	<p>Transformers</p> <p>Material relating to operational considerations about power transformers.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TOT
OP-20-16	<p>Load Curtailment</p> <p>Procedures and studies to mitigate overloads.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TOT
OP-20-19	<p>Voltage Charts</p> <p>System substation voltage readings.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 3 years and then destroy.</i></p>	TECS
OP-20-20	<p>Puget Sound Voltage Stability</p> <p>Material relating to plans to prevent voltage collapse in the Puget Sound Area.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 5 years and then destroy.</i></p>	TOT
OP-20-21	<p>WILSWA Voltage Stability</p> <p>Material relating to the Willamette Valley, Oregon/Southwest Washington area's voltage stability.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	TOT
OP-21	<p>Control Centers</p> <p>Material relating to power system control centers in general. Use tertiary subjects below for specific sites.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-21-11	<p>Dittmer Control Center</p> <p>Material relating to the Dittmer Control Center, including guide book development.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOH
OP-21-12	<p>Eastern Control Center and Munro Control Center</p> <p>Material relating to the Eastern Control Center (ECC), Moses Lake, WA and material relating to Munro Control Center, Mead, WA.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOV
OP-21-13	<p>Software Security</p> <p>Material relating to and regulations on software security. See also SS-18-13, Computer Security and IR-14, Automated Systems Security.</p> <p><i>Retention Schedule: N1-305-07-1-15/a</i> <i>Retain until superseded, then destroy</i></p>	TOV,TOH,TOS
OP-21-14	<p>Emergency Standby Power/Uninterruptible Power Supply</p> <p>Material relating to building requirements during outages of station service.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TOH,TOV
OP-21-15	<p>Fire Protection</p> <p>Material relating to halon systems, alarm procedures and evacuation procedures specifically for power system control centers.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TOH,TOV
OP-21-16	<p>Human Factors Design</p> <p>Material relating to guidance and requirements for dispatcher's displays, consoles and group boards. See also OP-26-22, RODS Display System.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 10 years and then destroy.</i></p>	TOH,TOS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-21-17	<p>Contingency Plans</p> <p>Material relating to vital records and contingency plans for control centers' emergency preparedness. See also OP-21-15, Fire Protection.</p> <p><i>Retention Schedule: N1-305-07-1-14/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	TOT,TOV
OP-21-18	<p>Interutility Control Center Communication Protocol (ICCP)</p> <p>Material relating to other utilities about installation and requirements for control center interface and user applications.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TOH,TOT
OP-22-11	<p>AGC Interim Spinning Reserve</p> <p>Material relating to manual data system from powerhouse to Realtime Operation Dispatch System (RODS).</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	TOT
OP-22-12	<p>AGC Powerhouse Data Acquisition System</p> <p>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.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	TOT
OP-22-15	<p>AGC Cost of Service - Load Following</p> <p>Material relating to the determination of charges to serve borderline loads (transfer customers).</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TOT
OP-22-16	<p>Numbers/Energy Accounting</p> <p>Material relating to after the fact accounting of automatic generation control (AGC) interchange flows vs. schedules.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 10 years and then destroy.</i></p>	TOD,TOT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-22-17	<p>Meter Check</p> <p>Material relating to the weekly check of meters.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 10 years and then destroy.</i></p>	TECS
OP-22-18	<p>AGC & Line Load Charts</p> <p>Records of power interchange with other utilities, Federal generation and control information used to monitor and analyze the operation of the power system.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 3 years and then destroy.</i></p>	TOD,TOH
OP-22-19	<p>Telemetry Alternate Route Requirements</p> <p>Material relating to alternate route requirements for telemetry.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOT
OP-22-20	<p>Mid-Columbia Coordination</p> <p>Material relating to an agreement with non-Federal dams owning entities to maximize water-use efficiency in the mid-Columbia River area.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOT
OP-22-22	<p>AGC at Munro Control Center</p> <p>Material relating to the AGC at Munro Control Center and material relating to alternate automatic generation control backup (BUAGC) at control centers.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOT
OP-23	<p>Frequency & Time Synchronization</p> <p>Material relating to central and remote time transmission to substations, local and alternate frequency sources.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 10 years and then destroy.</i></p>	TOT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-23-11	<p>System Time Synchronization</p> <p>Guidelines and agreements for central and satellite time systems.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TOT
OP-24	<p>Meter, Relay and Metering</p> <p>Requirements and use of these systems for engineering, operations and maintenance programs.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	KSM
OP-24-11	<p>Revenue Metering Systems</p> <p>Material relating to the implementation, addition or change of remotes, central computer and links to mainframe computer, RODS and the field.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 5 years and then destroy.</i></p>	KSM
OP-24-13	<p>Oscillographs</p> <p>Data collected for central monitoring and disturbance analysis.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 5 years and then destroy.</i></p>	TECS
OP-25	<p>Monitoring Systems</p> <p>Material relating to SCIM, DTLLM, IPS, PSDM, SEMM/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.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOT
OP-25-11	<p>Control Systems Monitor</p> <p>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.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOH

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-25-16	<p>Power System Disturbance Monitor</p> <p>Records saving interchange and generation data a high speed for post-disturbance analysis, including design and trigger requirements.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOT
OP-25-17	<p>Sequence of Events Monitor/Recorder</p> <p>Records that show centrally the events of local and regional disturbances. Includes requirements and alarm standards. Also known as SEMM/SUDS/SER.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOT
OP-25-18	<p>Voltage Monitoring Program</p> <p>Records that show SCADA voltage control actions, including program specifications.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOT
OP-25-19	<p>Powerhouse Response Test</p> <p>Guides for minimum performance and procedures for conducting tests.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	TOT
OP-25-21	<p>Hydromet/GOES</p> <p>Material relating to operation and maintenance of Geostationary Orbital Environmental System (GOES) satellite receiver. Also includes data gathered by the GOES which is managed by Power Supply (MGH).</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 5 years and then destroy.</i></p>	PGS

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OP-25-22	<p>Fault Locator Acquisition Recorder</p> <p>Material relating to user requirements and display features of the fault locator acquisition records (FLAR). See also OP-25-17, Sequence of Events Monitor/Recorder.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOT
OP-25-23	<p>Geomagnetic-Induced Current Monitoring</p> <p>Material relating to geomagnetic-induced current monitoring (GIC).</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TESM,TOT
OP-26	<p>Real-Time Operation Dispatch and Scheduling</p> <p>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 Dittmer Control Center, material on interchange scheduling, load forecasting, generation allocation, generation control, monitoring (OP-25), system security and reliability power flow studies.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TOH,TOS
OP-26-14	<p>Microwave Communication System</p> <p>Material relating to the program to monitor BPA's microwave system. Includes Badger, Microwave Monitor and Leased Line Lists. See also ED-20-12, Microwave System.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	TOH,TOS
OP-26-15	<p>RODS Performance</p> <p>Reports on availability and reliability.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	TOH,TOS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-26-16	<p>RODS Software Policy and Procedures</p> <p>Material relating to and including guides on documentation and change control.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TOH,TOS
OP-26-17	<p>Rotary Account Database</p> <p>Material relating to the Rotary Account Database and account assignment methods.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TOS
OP-26-21	<p>Front End Reconfiguration</p> <p>Material relating to plans to change computers, software and interfaces to new RODS.</p> <p><i>Retention Schedule: N1-305-07-1-5/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	TOH,TOS
OP-26-22	<p>RODS Display System</p> <p>Material relating to plans, new equipment and display guides. See also OP-21-16, Human Factors Design.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 10 years and then destroy.</i></p>	TOH,TOS
OP-27	<p>Supervisory Control and Data Acquisition</p> <p>Material relating to supervisory control and data acquisition (SCADA) system status reports, equipment, software and remote terminal units. Maintenance log books are kept with equipment. See also MA-11-12a, Substation Equipment and Materials.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 3 years and then destroy.</i></p>	TOS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-27-15	<p>SCADA Remote Terminal Units</p> <p>Material relating to requirements for connecting remote terminal units (RTUs) such as alarms and controls to control centers.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	TOH,TOS,TOT
OP-27-17	<p>Sequential Automatic Switching</p> <p>Material relating to plans to perform several switching steps with one command.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TOS
OP-27-18	<p>SCADA Backup for Emergencies</p> <p>Material relating to communication, RTU and central site requirements.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 7 years and then destroy.</i></p>	TOT
OP-27-19	<p>Southern Idaho Control</p> <p>Material relating to plans to place this area under dispatch jurisdiction of Eastern Control Center (ECC), Moses Lake, Washington and of Munro Control Center, Spokane, Washington.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	TOV
OP-27-20	<p>Dittmer SCADA</p> <p>Material relating to Dittmer Control Center (DCC) SCADA reports, equipment software and remote terminal units (RTUs).</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 3 years and then destroy.</i></p>	TOH,TOS
OP-27-22	<p>Munro SCADA</p> <p>Material relating to Munro Control Center (MCC) SCADA reports, equipment software and remote terminal units (RTUs).</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 3 years and then destroy.</i></p>	TOV

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-28	<p>Microwave Transfer Trip/Telephones</p> <p>Material relating to microwave transfer trip/telephone (MWTT) requirements or monitoring, installation for stability reasons and calling out repairs.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 7 years and then destroy.</i></p>	TOT
OP-29	<p>System Protection Relaying</p> <p>Material relating to requirements to change existing practices. Studies on need to reclose, three terminal trip needs, bus and bank protection schemes.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 7 years and then destroy.</i></p>	TOT
OP-30-11	<p>Generation and Load Databooks</p> <p>Generation to BPA by plants, monthly totals and maximums, yearly maximum generation by plants, maximum generation, NW Power Pool generation and loads, monthly average and maximums, yearly maximum generation and loads and maximum generation and load record, BPA main system loads, transfer customer loads, reductions in interruptible loads, pool transactions consisting of actual and scheduled interchange and storage interchange, daily plant elevation, flow and gross generation records and daily natural flow data.</p> <p><i>Retention Schedule: N1-305-07-1-4/d</i> <i>Retain for 25 years and then destroy.</i></p>	PGS
OP-30a	<p>Operations Information Program (Paper)</p> <p>Material such as after-the fact data about events like equipment load levels, customer and transmission outages, dispatcher actions, interchange transactions and meter readings. Includes studies and reports.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	TOT,TOV
OP-30b	<p>Operations Information Program (Magnetic Tape)</p> <p>Material such as after-the-fact data about events like equipment load levels, customer and transmission outages, dispatcher actions, interchange transactions and meter readings. Includes studies and reports.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 10 years and then destroy.</i></p>	TOT,TOV

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OP-31	<p>Reliability</p> <p>Material relating to reliability issues connected with operation of BPA's transmission system. See also ED-23, System Reliability Criteria and OP-26-15, RODS Performance.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOT
OP-31-11	<p>Reliability Operating Plan</p> <p>Material relating to control centers' plans that meet long-term system reliability needs.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TOT
OP-32	<p>Operating Bulletins</p> <p>Material relating to the standards, procedures, instructions and information for operating BPA's power system. Includes switching, clearances, inspections and operations at stations.</p> <p><i>Retention Schedule: N1-305-07-1-4/a</i> <i>Retain until superseded, then destroy</i></p>	TO,TOZ
OP-33	<p>Facility Sales - Substations</p> <p>Material relating to settlement agreement, policy and methodology developed as part of the 1995 BPA rate case used to propose, negotiate and sell low voltage and high voltage substations and related equipment. Low voltage is below 34.5KV and high voltage is 34.5KV and above.</p> <p><i>Retention Schedule: N1-305-07-1-11/c</i> <i>Retain while Active + 10 years, and then destroy.</i> <i>Active period ends when Delivery Facility Sales Program is terminated.</i></p>	FS
OP-33-11	<p>Low Voltage Substations</p> <p>Material relating to the sale of low voltage substations and high voltage equipment.</p> <p><i>Retention Schedule: N1-305-07-1-11/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when the facility is sold.</i></p>	FS

810 FILE GUIDE AND RETENTION SCHEDULE: OPERATIONS

Last Revision Date: July 12, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
OP-33-12	<p data-bbox="391 363 1032 384">High Voltage Substations and High Voltage Equipment</p> <p data-bbox="391 411 1170 468">Material relating to the sale of high voltage substations and high voltage equipment.</p> <p data-bbox="391 485 927 573"><i>Retention Schedule: N1-305-07-1-11/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when facility is sold.</i></p>	FS
OP-34	<p data-bbox="391 646 760 667">Transmission Wind Integration</p> <p data-bbox="391 695 1243 846">Materials related to the tools and pilot programs that allow BPA to make visible and provide additional capability for wind integration onto the transmission system. Documentation includes, but is not limited to, Dispatcher Standing Orders (DSO) 216 Tools and their resulting action items including Strikes, Failure to Comply and Waivers.</p> <p data-bbox="391 863 813 917"><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 6 years and then destroy.</i></p>	TOK

810 FILE GUIDE AND RETENTION SCHEDULE: POWER ASSET

Last Revision Date: September 7, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PA	<p>Power Asset</p> <p>Material relating to managemnt of Power Assets of the Federal Columbia River Power System. All records in this chapterare scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
PA-11	<p>Federal Columbia River Power System Asset Management Planning</p> <p>Category of activities relating to the management of Federal Columbia River Power System hydro assets.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-11-11	<p>Federal Columbia River Power System Strategy</p> <p>Materials related to defining the long-term direction of the hydro assets in context of an externally defined market landscape. Includes efforts to assess and manage risk at Federal Columbia River Power System projects.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-11-12	<p>Facility Asset Plan Development</p> <p>Project specific and system level plans to describe the particular performance targets and resource requirements for meeting the goals of the Federal Columbia River Power System strategy.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-11-13	<p>Federal Columbia River Power System Business Transformation Program</p> <p>Materials related to the business transformation program that focuses on closing performance gaps of the Federal Columbia River Power System. Includes assessments and initiatives.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF

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FILE GUIDE AND RETENTION SCHEDULE: POWER ASSET

Last Revision Date: September 7, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PA-11-14	<p>Hydro System Performance Measurement</p> <p>Specific performance measures and targets which measure progress towards meeting hydro program goals. This includes databases for tracking and reporting on performance.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-11-15	<p>Hydro Benchmarking Studies</p> <p>Hydro benchmarking studies and other materials that compare Federal Columbia River Power System assets performance against the assets of other utilities.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-11-16	<p>Value of Power Products</p> <p>Analysis to define the economic value of increments of availability, efficiency and capacity. Ancillary services are also considered.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-11-17	<p>Federal Columbia River Power System Communications</p> <p>Tools such as newsletters, videos and presentations that disseminate information among the U.S. Army Corps of Engineers, U.S. Bureau of Reclamation and BPA.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-11-18	<p>Federal Columbia River Power System Management Meetings</p> <p>Minutes and other information on meetings that are at the executive or mid-management level of all three Federal Columbia River Power System agencies.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF

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FILE GUIDE AND RETENTION SCHEDULE: POWER ASSET

Last Revision Date: September 7, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PA-11-19	<p>Joint Operating Committee (JOC) and Subcommittees</p> <p>Materials related to the conduct of the BPA/U.S. Bureau of Reclamation Joint Operating Committee and the BPA/U.S. Army Corps of Engineers Joint Operating Committee including meeting notes, charters, reports, etc.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-11-20	<p>Committee Memberships</p> <p>Participation in industry trade associations (e.g. Canadian Electric Association, Electric Power Research Institute, National Hydropower Association) who collaborate on projects of common interest.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-12	<p>Federal Columbia River Power System Capital Program</p> <p>General information regarding the development, management and review of the Federal Columbia River Power System Capital Investment Program as implemented under the provisions of National Environmental Policy Act 1992-Section 2406, two Memorandums of Agreement between BPA and the U.S. Bureau of Reclamation and U.S. Army Corps of Engineers and the Asset Management Strategy. File contents would include all materials generated regarding this program that are of a general or overview nature not appropriately filed in the secondary categories under this project.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-12-11	<p>Federal Columbia River Power System Capital Program Budget Management</p> <p>Materials used to develop out-year budgets, capital spending requests, supporting documentation and Capital Investment Review Process for the Federal Columbia River Power System Capital Investment Program. Materials include budget management documents, spreadsheets and actual or projected obligations, expenditures, etc. Documents regarding budget management processes or analyses using budget information are also included.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF

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FILE GUIDE AND RETENTION SCHEDULE: POWER ASSET

Last Revision Date: September 7, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PA-12-12	<p>Hydro Optimization</p> <p>Materials associated with research, development and operations at existing units, projects or the system that improve the efficiency at which hydropower generation is produced. Project specific subagreements are filed separately.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-12-13	<p>Hydro Generation Efficiency</p> <p>Materials associated with the large capital investments on improving generation efficiency at existing projects or units within a project. Actions such as turbine retrofits or replacements are examples of this type of activity. Project specific subagreements are filed separately.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-12-14	<p>Hydro Generation Expansion</p> <p>Materials associated with large capital investments to evaluate, plan, review and implement construction that expands or enlarges the generation capacity at existing Federal Columbia River Power System projects or development of new Federal project sites within the Federal Columbia River Power System geographical area. Project specific subagreements are filed separately.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-12-15	<p>Reliability Investments for Hydro Generation</p> <p>Materials associated with large capital investments that are directed to improving the generation reliability and/or availability of existing Federal Columbia River Power System units or projects. Project specific subagreements are filed separately.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-12-16	<p>Small Capital Investment</p> <p>Materials associated with all small capital program actions managed as a part of the direct-funded Operations and Maintenance program.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF

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FILE GUIDE AND RETENTION SCHEDULE: POWER ASSET

Last Revision Date: September 7, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PA-12-17	<p>Fish Capital Investments</p> <p>Materials associated with the U.S. Army Corps of Engineers' congressional-appointed fish and wildlife mitigation program for the Federal Columbia River Power System. Likewise, any capital activities for fish and wildlife undertaken by the U.S. Bureau of Reclamation or other Federal agencies would be filed here. Includes materials associated with capital investments stemming from current Biological Opinions, budget and repayment analyses for fish and wildlife investments.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-12-18	<p>Capital Subagreements</p> <p>Case files of all documents related to individual and system-wide sub-agreements between BPA and the U.S. Army Corps of Engineers and BPA and the U.S. Bureau of Reclamation.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-13	<p>Federal Columbia River Power System Operations and Maintenance Program</p> <p>General information regarding the development, management and review of the Federal Columbia River Power System Operations and Maintenance Program as implemented under the 1997 Direct Funding Memorandum of Agreement with U.S. Bureau of Reclamation and the 1998 Memorandum of Agreement with the U.S. Army Corps of Engineers.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-13-11	<p>Federal Columbia River Power System Operations and Maintenance Budget Management</p> <p>Materials used to develop out-year budgets, Operations and Maintenance budget requests, supporting documentation and budget process development for the Federal Columbia River Power System Operation and Maintenance Program. Materials include budget management documents, spreadsheets and actual or projected obligations, expenditures, etc. Documents regarding budget management processes and analyses are also included.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF

810 FILE GUIDE AND RETENTION SCHEDULE: POWER ASSET

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PA-13-12	<p>Maintenance Management</p> <p>Materials related to maintenance management for the Federal Columbia River Power System Operations and Maintenance Program.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-13-13	<p>Generating Unit Outage</p> <p>Materials related to development, implementation and management of the unit outage database. The Generating Unit Outage database is used to create, track and modify planned and real-time unit outages. Used to create the annual outage plan and to analyze the timing of planned outages. Unit Outage provides an interface to Hydro Scheduling and Planning (HSP) and provides two-way replication so that outage schedules can be viewed and maintained on the IR and CCN networks.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGSD,PGSP
PA-13-14	<p>Federal Columbia River Power System Operational Emergencies</p> <p>Policy-related documents, letters, memos, etc., covering a requested modification of the operation of the hydro system by BPA. Such correspondence would generally be between BPA and the U.S. Army Corps of Engineers, U.S. Bureau of Reclamation or other Federal or public interest groups. Internal memoranda could also be covered. The need to modify operations would be necessary to deal with critical supply situations.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-13-15	<p>Federal Columbia River Power System Hydro Projects</p> <p>Case files of all materials related to individual hydro projects operated by the U.S. Bureau of Reclamation and the U.S. Army Corps of Engineers excluding case files of all capital subagreements of each hydro project.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF

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FILE GUIDE AND RETENTION SCHEDULE: POWER ASSET

Last Revision Date: September 7, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PA-14	<p>New Technologies Research and Development</p> <p>Research into new technologies to try and advance power generation technology and operations.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-14-11	<p>Advanced Hydro Turbine Research</p> <p>Research coordinated by the Department of Energy with the U.S. Army Corps of Engineers, U.S. Bureau of Reclamation, BPA, industry and other utilities to try and advance turbine technology and improve fish passage.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-14-12	<p>Turbine Passage</p> <p>Research coordinated by the U.S. Army Corps of Engineers trying to improve fish passage through Columbia River projects. Includes materials and documents related to the 1% criteria research program.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGB,PGF
PA-15	<p>Transmission Issues</p> <p>Materials related to hydropower and transmission issues such as system reliability.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF
PA-15-11	<p>Transmission Support</p> <p>Materials related to Transmission support including Western Energy Coordinating Council (WECC) compliance, Automatic Generation Control (AGC), etc. Includes monthly reports BPA submits to Western Energy Coordinating Council.</p> <p><i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGF,TFB,DGF

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Last Revision Date: September 7, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
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PA-16	Irrigation Issues All files/materials related to irrigation load buy-down programs or any non-project related irrigation issues. <i>Retention Schedule: N1-305-07-1-1/b</i> <i>Retain while Active + 5 years, and then destroy.</i>	PGF
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810 FILE GUIDE AND RETENTION SCHEDULE: PROJECT COORDINATION

Last Revision Date: February 26, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PC	<p>Project Coordination</p> <p>Material relating to the updating and integration of a set of systems and process for the forecasting, marketing and scheduling for power products which is required to meet the corporate level requirements of monitoring revenue process, business risk measurement and management and data accessibility. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p> <p>.</p>	
PC-11	<p>Projects, Efficiency Program</p> <p>Records accumulated by individual projects that include, but is not limited to, Efficiencies Program overall activities. These materials relate to coordinating the cohesive strategy to produce an updated and integrated set of systems and processes for the forecasting, marketing and scheduling for power systems and/or products. This set of systems and processes is required to meet the corporate level requirements of monitoring revenue process, business risk measurement and management and data accessibility. File contents would include all material generated for this program that are in accordance with the program's scope. Included is such material as work orders, project costs, stage gates, progress completions and final reports. Individual project-specific sub-agreements are filed separately.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain while Active + 4 years, and then destroy.</i> <i>Active period ends when the project is completed or closed.</i></p>	ST
PC-11-11	<p>Projects-Background Material</p> <p>Background material and tools which include, but not limited to, newsletters, videos, surveys, project requirements, correspondence and presentations.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain while Active + 4 years, and then destroy.</i> <i>Active period ends when project is completed or closed.</i></p>	ST

810 FILE GUIDE AND RETENTION SCHEDULE: PROJECT COORDINATION

Last Revision Date: February 26, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
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PC-16	Transaction Scheduling System	PTK
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Material related to the development, management, implementation and review of the Transaction Scheduling System (TSS). The TSS project is a fully integrated computer system that performs PBL scheduling functions from schedule entry through After-the Fact Report Generation. It facilitates the entire power/transmission transaction process from the moment the contract is signed until it is billed. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.

Retention Schedule: N1-305-07-1-2/b

Retain while Active + 4 years, and then destroy.

Active period ends when system is no longer in production.

810 FILE GUIDE AND RETENTION SCHEDULE: PERSONNEL

Last Revision Date: June 8, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE	<p>Personnel</p> <p>Material relating to objectives, policies, procedures and operations of personnel activities. See PEa and Peb.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
PE-11-11a	<p>Official Personnel Folders - Permanent Individual Employee Records - Current Employees</p> <p>Records filed on the right side of the Official Personnel Folder (OPF). (a) Current employees.</p> <p><i>Retention Schedule: GRS-1/1</i> <i>Retain for 0 years and then destroy.</i> <i>Disposition: See Federal Personnel Manual for instructions relating to folders of employees transferred to another agency.</i></p>	NHO
PE-11-11b	<p>Official Personnel Folders - Permanent Individual Employee Records - Transferred Employees</p> <p>Records filed on the right side of the Official Personnel Folder (OPF). (b) Transferred employees.</p> <p><i>Retention Schedule: GRS-1/1</i> <i>Retain for 0 years and then destroy.</i> <i>Disposition: See Federal Personnel Manual for instructions relating to folders of employees transferred to another agency.</i></p>	NHO
PE-11-11c	<p>Official Personnel Folders - Permanent Individual Employee Records - Separated Employees</p> <p>Records filed on the right side of the Official Personnel Folder (OPF). (c) Separated employees.</p> <p><i>Retention Schedule: GRS-1/1</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Disposition: Transfer folder to National Personnel Records Center (NPRC), St. Louis, MO, 30 days after latest separation. NPRC will destroy 65 years after separation from Federal service.</i></p>	NHO

810 FILE GUIDE AND RETENTION SCHEDULE: PERSONNEL

Last Revision Date: June 8, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-11-12	<p>Temporary Individual Employee Records</p> <p>All copies of correspondence and forms maintained on the left side of the Official Personnel Folder in accordance with Chapter 3 of the Guide to Personnel Recordkeeping EXCLUDING the Immigration and Naturalization Service Form I-9 and performance-related records. See also PE-25-14, Non-SES Employee Performance File System Records.</p> <p><i>Retention Schedule: GRS-1/10</i> <i>Retain until superseded, then destroy</i> <i>Destroy when superseded or obsolete, or upon separation or transfer of employee, unless specifically required to be transferred with the OPF.</i></p>	NHO
PE-11-13	<p>Administrative Officers'/Supervisors' Personnel</p> <p>Correspondence, forms and other records relating to positions, authorizations, pending actions, copies of position descriptions, requests for personnel action and other individualized records on individual employees duplicated in or not appropriate for the Official Personnel Folder (OPF). Does not include employee performance files (EPFs). (EPFs include the supervisor's personal notes and copies of all documents relating to an employee's performance kept by the supervisor and/or administrative staff. The EPF is separate and distinct from the records kept under this category. See PE-25, Performance Management.) CAUTION: These records are subject to provisions of the Privacy Act. See also PE-11-11, Permanent Individual Employee Records and PE-11-12, Temporary Individual Employee Records, for record copy maintained by Personnel function.</p> <p><i>Retention Schedule: GRS-1/18(a)</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	Z
PE-13	<p>Personnel Management in Agencies</p> <p>Material relating to general program concepts, planning and policies, including prototypes.</p> <p><i>Retention Schedule: GRS-16/1(a)&(b)</i> <i>Retain until superseded, then destroy</i> <i>Destroy when superseded or obsolete.</i></p>	NHI
PE-13-11	<p>DOE Personnel Organization and Functions</p> <p>Material relating to Department of Energy personnel management concepts, planning and policies, including prototypes.</p> <p><i>Retention Schedule: GRS-16/1(a)&(b)</i> <i>Retain until superseded, then destroy</i></p>	NH,NHI

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Last Revision Date: June 8, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-13-12	<p>BPA Personnel Organization and Functions</p> <p>Material relating to BPA headquarters and area personnel management concepts, planning and policy, including prototypes.</p> <p><i>Retention Schedule: GRS-16/1(a)&(b)</i> <i>Retain until superseded, then destroy</i></p>	NH,NHI
PE-14	<p>Reporting Requirements</p> <p>Reports, audits, justifications and related material prepared for other Federal agencies such as the Office of Management and Budget (OMB) and for DOE or BPA.</p> <p><i>Retention Schedule: GRS-1/16</i> <i>Retain for 2 years and then destroy.</i></p>	NH,NHI
PE-15	<p>Personnel Records Systems</p> <p>Systems tracking such personnel data as employee position numbers, position titles and personal histories. Includes Employee Record Cards.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	NHO
PE-16	<p>Processing Personnel Actions</p> <p>Material relating to Standard Form 52, Request for Personnel Action and associated forms and processes. Includes material not maintained in OPF and pertaining to pending personnel actions.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHO
PE-16-11	<p>Notifications of Personnel Actions</p> <p>Standard Form 50 documents initial employment, promotions, transfers, separation and all other individual personnel actions, exclusive of those in Official Personnel Folders. Based on GRS-1/14.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain for 2 years and then destroy.</i></p>	NHO

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Last Revision Date: June 8, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-17	<p>Employment</p> <p>Material relating to procedures, eligibility, implementation and authority of employment activities and programs. (Includes Career/Career-Conditional and Temporary and Term Employment, Excepted and Senior Executive Service, Details, Status Reinstatement, Other-Than-Full-Time Permanent Employment, Veterans Preference, Volunteers, Veteran's Readjustment Appointments (VRA), Youth and Student Employment, Cooperative Education, Telecommuting and others.)</p> <p><i>Retention Schedule: N1-305-07-1-7/c</i> <i>Retain for 5 years and then destroy.</i></p>	NHS,NHQ
PE-18	<p>Promotion and Internal Placement</p> <p>Material relating to the development and implementation of policy and procedures for promotion and placement within Federal Government service. Includes transfer to other agencies.</p> <p><i>Retention Schedule: N1-305-07-1-7/c</i> <i>Retain for 5 years and then destroy.</i></p>	NHQ
PE-18-11a	<p>BPA Merit Promotion Plan - Case Files Relating to Promotion</p> <p>(a) Case files relating to the promotion of an individual that document the individual's qualification standards, the evaluation methods, selection procedures and evaluations of candidates excluding any records that duplicate information in the promotion plan, the Official Personnel Folders or in other personnel records.</p> <p><i>Retention Schedule: GRS-1/32</i> <i>Retain for 3 years and then destroy.</i></p>	NHQ
PE-18-11b	<p>BPA Merit Promotion Plan - Apprenticeship/Craftsman Training Promotion Files</p> <p>(b) Apprenticeship and Craftsman Training Promotion Files. Same as PE-18-11 (a) except specific to Apprenticeship and Craftsman only. See also PE-24-19 (b), BPA-sponsored Training--Apprenticeship and Trainee Programs. Based on CFR 29 A 30.8(3).</p> <p><i>Retention Schedule: N1-305-07-1-7/c</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	NHQ

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Last Revision Date: June 8, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-18-14	<p>Status Applicant File</p> <p>Material relating to applications for reinstatement or transfer to positions at BPA. Does not apply to applications from current BPA employees.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain for 1 years and then destroy.</i></p>	NHQ
PE-18-15	<p>Reassignments and Transfers</p> <p>Material pertaining to the movement of current employees from one position to another or from one Federal agency to another.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ
PE-18-16	<p>Temporary Promotions</p> <p>Materials relating to promotions that are temporary or limited in duration.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ
PE-19	<p>Probation</p> <p>Material including instructions, policy and directives concerning employee probation.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHE
PE-19-11	<p>New Employee Probation</p> <p>Material covering new career-conditional employee information, including lists.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	NHO
PE-19-12	<p>Probation for New Supervisors and Managers</p> <p>Material including lists, staff functions, class offerings and mandated tasks.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	NHE

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PE-20	<p>Recruitment, Selection, and Placement</p> <p>Material relating to actions concerning both employees and the general public.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ
PE-20-11a	<p>Priority Placement Program -</p> <p>(a) Material relating to priority placement for consideration for vacant positions (for example, employees who were previously downgraded by a reduction-in-force (RIF) action or changes in positions).</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ
PE-20-11b	<p>Priority Placement Program - Case Files</p> <p>(b) Case files.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	NHQ
PE-20-12	<p>Employment Applications</p> <p>Applications (Standard Form 171) and related records, excluding materials relating to appointments requiring Senatorial confirmation and applications resulting in appointments that are filed in the Official Personnel Folder.</p> <p><i>Retention Schedule: GRS-1/15</i> <i>Retain for 3 years and then destroy.</i></p>	NHQ
PE-20-14	<p>Suitability for Employment</p> <p>Case files relating to the application of suitability criteria.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain for 3 years and then destroy.</i></p>	NHS
PE-21	<p>Recruitment and Examining</p> <p>Material relating to recruitment of positions open to the general public other than tertiary subjects listed below.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ

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PE-21-11	<p>Delegations of Examining Authority</p> <p>Material relating to agreements between the Office of Personnel Management (OPM) and BPA to authorize recruitment and rating for positions at BPA.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	NHQ
PE-21-13	<p>Direct-Hire Programs</p> <p>Material relating to competitive and noncompetitive employment processes and programs. Includes Engineer Direct Hire Program.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ
PE-21-14	<p>Outstanding Scholar/Bicultural Program</p> <p>Material relating to entry at the GS-5 and GS-7 level, including authorizations, correspondence and permission to use program.</p> <p><i>Retention Schedule: N1-305-07-1-7/c</i> <i>Retain for 5 years and then destroy.</i></p>	NHQ
PE-21-15	<p>Tests and Evaluations</p> <p>Material relating to the testing of candidates.</p> <p><i>Retention Schedule: N1-305-07-1-7/c</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	NHQ
PE-21-16	<p>Certificate of Eligibles</p> <p>Certificates of eligibles with related requests, forms and statements from applicants and selecting officials.</p> <p><i>Retention Schedule: GRS-1/5</i> <i>Retain for 2 years and then destroy.</i></p>	NHQ
PE-21-17	<p>Examining System Registers</p> <p>Material relating to rated applications which are recruited from the general public and held for referral to positions under competitive examining procedures.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain for 3 years and then destroy.</i></p>	NHQ

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PE-21-18a	<p>Certification Files - OFM Delegated Authority</p> <p>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 and forms. Includes the original Standard Form 39, Request for Certificate of Eligibles. (a) Office of Personnel Management (OPM) delegated authority.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain for 3 years and then destroy.</i></p>	NHQ
PE-21-18b	<p>Certification Files - DOE and BPA Authority</p> <p>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 and forms. Includes the original Standard Form 39, Request for Certificate of Eligibles. (b) Department of Energy (DOE) and BPA authority.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain for 3 years and then destroy.</i></p>	NHQ
PE-22	<p>Qualification Requirements</p> <p>Material relating to Handbook 118, Qualifications Standards for Positions under General Schedule, requirements and related material and requests for exceptions and proposed changes. Includes comments on draft qualification standards, professional licensing requirements and implications, qualification appeals, challenges and inquiries, career development agreements and medical qualification requirements.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHS,TFBT
PE-23	<p>Intern Programs</p> <p>Material relating to formally designated programs and correspondence for approvals. Includes Presidential Management Interns, career interns and similar programs. Case files are included in Official Personnel Folder.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ

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PE-24	<p>Training</p> <p>General material relating to employee development programs and courses offered by BPA, other Federal agencies and private institutions.</p> <p><i>Retention Schedule: GRS-1/29(a)(2)</i> <i>Retain for 3 years and then destroy.</i></p>	Z
PE-24-18	<p>Employee Development-Sponsored Training Programs</p> <p>Material relating to institutionalized programs such as New Employee Orientation, Executive Development, Management and Middle Management Development Programs among others.</p> <p><i>Retention Schedule: N1-305-07-1-8/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	NHT
PE-24-19a	<p>BPA-Sponsored Training - Establishment and Operation of Training Courses</p> <p>(a) Material relating to the establishment and operation of training courses and conferences, including course announcements except as described in (b) below. The active period for these records is usually the fiscal year.</p> <p><i>Retention Schedule: GRS-1/29(a)(1)</i> <i>Retain for 5 years and then destroy.</i></p>	NHT,TFBT
PE-24-19b	<p>BPA-Sponsored Training - Formal BPA-Sponsored Apprenticeship Training</p> <p>(b) Materials relating to formal BPA-sponsored Apprenticeship and Trainee programs for the following occupations: Data Systems Control Craftsman, PSC/SPM Craftsman, Instrumentation Craftsman, Electrical Test and Development Craftsman E and L, Substation Operator, Carpenter, Painter, Heavy Mobile Equipment Mechanic, Assistant Dispatcher, Material Handler, Reproduction Shop (Printing), Electrical Rigger, Lineman, Electrician, Heavy Truck Driver and Heavy Equipment Operator. Development and documentation of the programs are conducted by the organization that sponsors the technical specialty. Records include correspondence, examination results, committee reports, copies of Personnel Actions and related data not retained in the employee's Official Personnel Folder [OPF]. See also PE-18-11(b), BPA Merit Promotion Plan - Apprenticeship/Craftsman Training Promotion Files.</p> <p><i>Retention Schedule: GRS-1/29(a)(1) and (2)</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends upon completion of the 3 and 4 year programs.</i></p>	NHT,TFZ,TOD, TOZ

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-24-20	<p data-bbox="391 363 837 384">Other-Than-BPA-Sponsored Training</p> <p data-bbox="391 411 1211 531">Material relating to the availability of training and employee participation in training programs sponsored by other governmental agencies or non-governmental institutions. Includes material captured on BPA's Automated Training System (ATS).</p> <p data-bbox="391 548 792 604"><i>Retention Schedule: GRS-1/29(b)</i> <i>Retain for 5 years and then destroy.</i></p>	NHT,TFBT,TFZ
PE-24-21	<p data-bbox="391 678 760 699">Training Aids/Course Contents</p> <p data-bbox="391 726 1235 783">One copy of each manual, syllabus, textbook and other training aids, including objectives and course contents developed by the BPA.</p> <p data-bbox="391 800 813 856"><i>Retention Schedule: N1-305-07-1-8/a</i> <i>Retain until superseded, then destroy.</i></p>	NHT,TFBT
PE-25	<p data-bbox="391 930 708 951">Performance Management</p> <p data-bbox="391 978 1170 999">Material relating to program requirements for performance management.</p> <p data-bbox="391 1016 813 1077"><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain for 3 years and then destroy.</i></p>	NHI,NHE
PE-25-14a	<p data-bbox="391 1150 1187 1207">Non-SES Employee Performance File System Records - Appraisals of Unacceptable Performance</p> <p data-bbox="391 1224 1235 1371">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 and all related documents.</p> <p data-bbox="391 1388 1154 1541"><i>Retention Schedule: GRS-1/23(a)(1)</i> <i>Retain while Active + 1 years, and then destroy.</i> <i>Active period ends when employee completes 1 year of acceptable performance from the date of the written advance notice of proposed removal or reduction in grade notice.</i></p>	NHO

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-25-14b	<p>Non-SES Employee Performance File System Records - Performance Records</p> <p>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. (b) Performance records superseded through an administrative, judicial or quasi-judicial procedure.</p> <p><i>Retention Schedule: GRS-1/23(a)(2)</i> <i>Retain until superseded, then destroy.</i></p>	NHO
PE-25-14c	<p>Non-SES Employee Performance File System Records - Performance Related Records -</p> <p>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. (c) Performance related records pertaining to a former employee.</p> <p><i>Retention Schedule: GRS-1/23(a)(3)(b)</i> <i>Retain for 4 years and then destroy.</i></p>	NHO
PE-25-14d	<p>Non-SES Employee Performance File System Records - All Other Performance Records</p> <p>(d) All other summary performance appraisal records, including performance appraisals, contracts and job elements and standards upon which they are based.</p> <p><i>Retention Schedule: GRS-1/23(a)(4)</i> <i>Retain for 4 years and then destroy.</i></p>	NHQ,NHT,NHO
PE-25-14e	<p>Non-SES Employee Performance File System Records - Supporting Documents</p> <p>(e) Supporting documents including Individual Development Plans (IDP's), Occupational Development Plans (ODP's).</p> <p><i>Retention Schedule: GRS-1/23(a)(5)</i> <i>Retain for 4 years and then destroy.</i></p>	Z
PE-25-15a	<p>SES Employee Performance File System Records - Performance Records</p> <p>(a) Performance records superseded through an administrative, judicial or quasi-judicial procedure.</p> <p><i>Retention Schedule: GRS-1/23(b)(1)</i> <i>Retain until superseded, then destroy.</i></p>	SP,NHO

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PE-25-15b	<p>SES Employee Performance File System Records - Performance Related Records</p> <p>(b) Performance related records pertaining to a former SES appointee.</p> <p><i>Retention Schedule: GRS-1/23(b)(2)(a)</i> <i>Retain for 5 years and then destroy.</i></p>	SP,NHO
PE-25-15c	<p>SES Employee Performance File System Records - All Other Performance Records -</p> <p>(c) All other performance appraisals with the job elements and standards (job exceptions) upon which they are based.</p> <p><i>Retention Schedule: GRS-1/23(b)(3)</i> <i>Retain for 5 years and then destroy.</i> <i>Active period ends after the date of appraisal, exclusive of any interim service as a Presidential appointee.</i></p>	S,SP,NHO
PE-25-15d	<p>SES Employee Performance File System Records - Supporting Documents</p> <p>(d) Supporting documents.</p> <p><i>Retention Schedule: GRS-1/23(b)(4)</i> <i>Retain for 5 years and then destroy.</i></p>	SP,NHO
PE-26	<p>Employee Awards and Recognition</p> <p>Material relating to awards presented to or recognition given Federal employees. Includes recommendations, approved nominations, correspondence, reports and related handbooks pertaining to agency-sponsored cash and non-cash awards such as incentive awards, within-grade merit increases, suggestions and outstanding performance. Also includes People-to-People program.</p> <p><i>Retention Schedule: GRS-1/12(a)(1)</i> <i>Retain for 2 years and then destroy.</i></p>	NHE
PE-26-13	<p>Employee Suggestion Program</p> <p>Formal suggestions, related correspondence and status reports about the Employee Suggestion Program.</p> <p><i>Retention Schedule: GRS-1/12(a)(1)</i> <i>Retain for 2 years and then destroy.</i></p>	NHE

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PE-26-14	<p>Employee Recognition Program</p> <p>Material including the preparation, publicity and participation in Administrator's Excellence Awards Day and similar activities.</p> <p><i>Retention Schedule: GRS-1/13</i> <i>Retain for 3 years and then destroy.</i></p>	NHE
PE-26-15	<p>Length of Service</p> <p>Materials relating to computation of service awards and lists of awardees.</p> <p><i>Retention Schedule: GRS-1/12(b)</i> <i>Retain for 1 years and then destroy.</i></p>	NHE
PE-26-16	<p>Letters of Commendation or Appreciation</p> <p>Copies of letters recognizing length of service and retirement and letters of appreciation and commendation excluding copies filed in the Official Personnel Folder.</p> <p><i>Retention Schedule: GRS-1/12(a)(1)</i> <i>Retain for 2 years and then destroy.</i></p>	NHE
PE-26-17	<p>Cash Awards</p> <p>BPA-sponsored awards such as sustained superior awards, quality increase awards and special act awards, excluding copies filed in the Official Personnel Folder.</p> <p><i>Retention Schedule: GRS-1/12(a)(1)</i> <i>Retain for 2 years and then destroy.</i></p>	NHE
PE-26-18	<p>Honor/Non-monetary Awards</p> <p>DOE and Administrator awards such as distinguished service and special achievement awards, excluding copies filed in the Official Personnel Folder.</p> <p><i>Retention Schedule: GRS-1/12(a)(1)</i> <i>Retain for 2 years and then destroy.</i></p>	NHE
PE-27	<p>Personnel Research and Demonstration Projects</p> <p>Special studies and project proposals.</p> <p><i>Retention Schedule: NI-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHI

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-28	<p>Position Classification</p> <p>Material relating to policies and approaches affecting the determination of appropriate General Schedule (GS) series and grade levels.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ
PE-28-12a	<p>Position Classification Standards - Standards and Guidelines Issued by OPM</p> <p>(a) Standards or guidelines issued by the Office of Personnel Management (OPM) and used to classify and evaluate positions for series and grade level.</p> <p><i>Retention Schedule: GRS-1/7(a)(1)</i> <i>Retain until superseded, then destroy.</i></p>	NHQ
PE-28-12b	<p>Position Classification Standards - Material Requiring OPM Review</p> <p>(b) Material requiring Office of Personnel Management (OPM) review about the development of standards for classification of positions specific to BPA. Case files.</p> <p><i>Retention Schedule: GRS-1/7(a)(2)(a) & (b)</i> <i>Retain until superseded plus 5 years, and then destroy.</i> <i>Active period ends after position is abolished or description is superseded.</i></p>	NHQ
PE-28-12c	<p>Position Classification Standards - Review File</p> <p>(c) Review file.</p> <p><i>Retention Schedule: GRS-1/7(a)(2)(a) & (b)</i> <i>Retain for 2 years and then destroy.</i></p>	NHQ
PE-28-13	<p>Series Subcodes - GS Positions</p> <p>Material relating to coding of positions for General Schedule series as required by the PAY/PERS system.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ

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PE-28-14	<p>Position Descriptions</p> <p>Material describing established positions including information on title, series, grade, duties and responsibilities.</p> <p><i>Retention Schedule: GRS-1/7(b)</i> <i>Retain until superseded plus 2 years, and then destroy.</i> <i>Active period ends after position is abolished or description is superseded.</i></p>	NHQ
PE-28-16	<p>Classification Appeals</p> <p>Employee or Agency-instituted appeals.</p> <p><i>Retention Schedule: GRS-1/7(d)</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends after case is closed.</i></p>	NHQ
PE-28-17a	<p>Classification Studies and Surveys - Classification Survey Reports</p> <p>(a) Classification survey reports. Survey reports on various positions prepared by classification specialists, including periodic reports.</p> <p><i>Retention Schedule: NI-305-07-1-7/b</i> <i>Retain for 3 years and then destroy.</i></p>	NHQ
PE-28-17b	<p>Classification Studies and Surveys - Inspection, Audit, and Survey File</p> <p>(b) Inspection, audit and survey file. Material relating to inspections, surveys, desk audits and evaluations.</p> <p><i>Retention Schedule: GRS-1/7(c)(1) & (2)</i> <i>Retain until superseded, then destroy.</i></p>	NHQ
PE-29	<p>Hourly Job Evaluation</p> <p>Material relating to sets of duties assigned hourly positions.</p> <p><i>Retention Schedule: NI-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ,NHL
PE-29-11	<p>Job Standards</p> <p>Material relating to duties set by labor agreements.</p> <p><i>Retention Schedule: NI-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ,NHL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-30	<p>Pay Administration</p> <p>General and administrative material relating to the various pay plans and schedules.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHQ
PE-31	<p>Hours and Places of Duty</p> <p>Material relating to policies and procedures concerning various government-approved work schedules. Includes flexitime, flexiplace, telecommuting, part-time and alternative work schedules.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHS
PE-32	<p>Attendance and Leave</p> <p>Material relating to accrual and eligibility for leave, 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.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHS
PE-33	<p>Fund-Raising and Community Outreach</p> <p>Material relating to programs such as the Combined Federal Campaign (CFC), blood drives and U.S. Savings Bond drives.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	Z
PE-34	<p>Labor-Management Relations</p> <p>Material relating to the relationship between management and employee unions and other groups.</p> <p><i>Retention Schedule: GRS-1/28(a)(1)</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends upon expiration of agreement.</i></p>	NHL

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PE-34-15	<p>Labor Unions</p> <p>Material relating to employee unions such as contracts and negotiated agreements.</p> <p><i>Retention Schedule: GRS-1/28(a)(1)</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends upon expiration of agreement.</i></p>	NHL
PE-34-16	<p>Labor Arbitration Decisions</p> <p>Material relating to decisions resulting from labor arbitration.</p> <p><i>Retention Schedule: GRS-1/28(a)(1)</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends upon expiration of agreement.</i></p>	NHL
PE-34-17	<p>Grievance and Labor Arbitration</p> <p>Case files consisting of grievances and resulting arbitration.</p> <p><i>Retention Schedule: GRS-1/28(b)</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends upon expiration of agreement.</i></p>	NHL,L
PE-35	<p>Employee Organizations and Activities</p> <p>Material relating to employee organizations such as the Professional Engineers in Government (PEG), Society of Concerned Engineers (SCE) and Northwest Federal Employees Association (&quot;Associates”).</p> <p><i>Retention Schedule: NI-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	Z
PE-36	<p>Equal Employment Opportunity</p> <p>Documentation relating to all aspects of administering the federally mandated equal opportunity program at BPA. Includes special emphasis programs, observances of special events, monitoring and reporting and discrimination complaints.</p> <p><i>Retention Schedule: GRS-1/25(g)</i> <i>Retain for 3 years and then destroy.</i></p>	DGE

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PE-36-11	<p>Programs</p> <p>Special emphasis programs managed by the BPA EEO office, including the Federal Women's Program and the Hispanic Employment Program.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain for 3 years and then destroy.</i></p>	DGE
PE-36-12	<p>Observances</p> <p>Activities held to celebrate holidays and for recognition relating to civil rights and employment, including Martin Luther King Holiday and Hispanic Heritage Week.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain for 3 years and then destroy.</i></p>	DGE
PE-36-13	<p>Outreach</p> <p>Contacts with schools, community groups for the purpose of generating interest in careers at BPA. Includes career fairs, speeches at schools and seminars.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain for 3 years and then destroy.</i></p>	DGE,DKE
PE-36-14	<p>Formal Discrimination Complaints</p> <p>Documentation of formal complaints of discrimination filed by DOE or BPA employees, contractors (under provisions of contingent workers) or applicants for employment. Originating agency's file contains formal complaint-related correspondence, reports of investigation, exhibits, settlement agreements and withdrawal notices, designation of representative, copies of decisions, records of hearings and meetings and Informal Discrimination Complaint records. Cases are resolved within the agency, by the Equal Employment Opportunity Commission or by a U.S. Court.</p> <p><i>Retention Schedule: GRS-1/25(a)</i> <i>Retain while Active + 4 years, and then destroy.</i> <i>Active ends upon resolution of case.</i></p>	DGE,L
PE-36-16	<p>EEO Reporting</p> <p>Statistical information supporting the Affirmative Employment Plan.</p> <p><i>Retention Schedule: GRS-1/25(f)</i> <i>Retain for 5 years and then destroy.</i></p>	DGE

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-36-17	<p>Informal Discrimination Complaints (a.k.a. EEO Counseling)</p> <p>Documentation of informal discrimination complaints filed by DOE or BPA employees, contractors (under provisions of contingent workers) or applicants for employment. Includes contacts, consultations and informal EEO counseling cases. Originating agency's file contains correspondence and documents to include the Notice of Rights forms (Confidentiality Release, Initiation of Informal Counseling Process, Alternative Dispute Resolution Election, Notification Regarding Election of MSPB or EEO), request for and approval of extension of Informal EEO counseling period, settlement agreements and withdrawal notices, designation of representative, Notice of Final Interview, EEO Counselor's Report and related documents gathered during the informal process.</p> <p><i>Retention Schedule: GRS-1/25(c)2</i> <i>Retain while Active + 2 years, and then destroy.</i> <i>Active period ends upon disposition/resolution of case.</i></p>	DGE
PE-37	<p>Political Activity of Federal Employees</p> <p>Material relating to restrictions on political activity under the Hatch Act.</p> <p><i>Retention Schedule: NI-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHE
PE-38a	<p>Financial Disclosure Requirements - Records Including Standard Form 278</p> <p>(a) Records including Standard Form 278 for individuals filing according to Section 201b of the Act (Senior Executive Service (SES) candidates) and not subsequently confirmed by the U.S. Senate.</p> <p><i>Retention Schedule: NI-305-07-1-7/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	L
PE-38b	<p>Financial Disclosure Requirements - All Other Financial Disclosure Records</p> <p>(b) All other financial disclosure records such as OGE 450, statements of employment and of financial interests and related records.</p> <p><i>Retention Schedule: NI-305-07-1-7/c</i> <i>Retain for 6 years and then destroy.</i></p>	L

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-39	<p>Employee Conduct and Ethics</p> <p>Material relating to codes of ethics and standards of conduct for Federal employees. Includes BPA's cultural commitment program, management of anti-harassment effort and diversity.</p> <p><i>Retention Schedule: GRS-1/27</i> <i>Retain until superseded, then destroy.</i></p>	L
PE-39-12	<p>Conflict of Interest</p> <p>Statements of past employment, current financial interests and related material as required for specified BPA employees.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	L
PE-39-13	<p>Pluralism Council</p> <p>Material relating to employee-driven issues based on BPA's recognition that its people are enabled by structure, systems, process and culture to achieve for BPA the results desired for it to be a high-performing, business-oriented agency. [As defined by Strategic Business Order 7 (SBO-7), 1995]. Includes documentation of actions and philosophies of BPA's Resource Groups.</p> <p><i>Retention Schedule: N1-305-07-1-7/c</i> <i>Retain for 5 years and then destroy.</i></p>	DGE
PE-41	<p>Voluntary Separations & Reductions in Grade/Rank/Pay</p> <p>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.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHI,NHO

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-42	<p>Adverse Actions/Discipline</p> <p>Case files and related records created in reviewing an adverse advice (disciplinary or non-disciplinary 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.</p> <p><i>Retention Schedule: GRS-1/30(b)</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when the subject employee leaves BPA rolls.</i></p>	NHE,L
PE-42-11	<p>Unacceptable Performance Actions</p> <p>Case files and related records created in reviewing performance-based actions as defined in 5 CFR 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.</p> <p><i>Retention Schedule: GRS-1/30(b)</i> <i>Retain for 7 years and then destroy.</i> <i>Active period ends when the subject employee leaves BPA rolls.</i></p>	NHE
PE-42-12a	<p>Reduction in Force - Registers From Which RIF Actions Taken</p> <p>(a) Registers from which reduction-in-force actions have been taken.</p> <p><i>Retention Schedule: NI-305-07-1-7/b</i> <i>Retain for 2 years and then destroy.</i></p>	NHI,NHQ
PE-42-12b	<p>Reduction in Force - Registers From Which No RIF Actions Taken</p> <p>(b) Registers from which no reduction-in-force actions have been taken.</p> <p><i>Retention Schedule: NI-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHI,NHQ
PE-42-14	<p>Grade and Pay Retention</p> <p>Material relating to entitlement to grade and pay retention during reduction-in-force or other adverse action procedures.</p> <p><i>Retention Schedule: NI-305-07-1-7/b</i> <i>Retain while Active + 4 years, and then destroy.</i></p>	NHQ

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-43	<p>Grievances and Appeals</p> <p>Review of grievance and appeals raised by agency employees, 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 procedures. See also PE-28-16, Classification Appeals.</p> <p><i>Retention Schedule: GRS-1/30(a)</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when the subject employee leaves BPA rolls.</i></p>	NHL,NHE,L
PE-44	<p>Injury Compensation</p> <p>Material relating to claims under the Office of Workers Compensation Programs (OWCP). See also PE-53-11, Personal Injury.</p> <p><i>Retention Schedule: NI-305-07-1-7/c</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	NHS,L
PE-44-11	<p>Chargeback Billings</p> <p>Material relating to costs of compensation made under OWCP claims.</p> <p><i>Retention Schedule: NI-305-07-1-7/c</i> <i>Retain for 5 years and then destroy.</i></p>	NHS
PE-44-12	<p>OWCP Cases</p> <p>Material relating to individual employees with OWCP claims.</p> <p><i>Retention Schedule: NI-305-07-1-7/c</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	NHS,L
PE-45	<p>Retirement System</p> <p>Material relating to policies concerning governmental retirement systems including Social Security, Medicare, Federal Employees Retirement System (FERS) and Civil Service Retirement System (CSRS). See also FI-19-21, Retirements.</p> <p><i>Retention Schedule: NI-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHO

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-46	<p>Health Program</p> <p>Material relating to employee medical and counseling services and the operation of health facilities. Disposition: Per 5 Code of Federal Regulations Section 293, retain for duration of employment. Do not destroy. Forward to next employing agency with the OPF. Transfer records not required for filing in the OPF to a local Federal Records Center [FRC].</p> <p><i>Retention Schedule: GRS-1/21</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Active period ends upon employee separation.</i></p>	NHS
PE-46-11	<p>Individual Health Records</p> <p>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. Disposition: Per 5 Code of Federal Regulations section 293, retain for duration of employment. Do not destroy. Forward to next employing agency with the OPF. Transfer records not required for filing in the OPF to a local Federal Records Center [FRC].</p> <p><i>Retention Schedule: GRS-1/21</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Active period ends upon employee separation.</i></p>	NHS
PE-46-12	<p>Health Unit Controls</p> <p>Logs or registers reflecting daily number of visits to dispensaries, first-aid rooms and health units. These records are the property of and are controlled by U.S. Public Health Service.</p> <p><i>Retention Schedule: GRS-1/20(a)</i> <i>Retain while Active + 0.25 years, and then destroy.</i></p>	NHS
PE-46-13a	<p>Employment-related Medical Records</p> <p>Employee Medical Files (EMF), completed performance appraisals and related material for non-SES appointees as defined in 5 USC 4301(2). See also PE-25-14a-e.</p> <p><i>Retention Schedule: N1-305-07-1-GRS-1/21</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Employee medical files (EMF) are sent to NPRC when employee separates.</i></p>	NHS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-46-13b	<p>Employment-Related Medical Records</p> <p>Medical files such as fitness for duty, voluntary physicals, etc. Completed performance appraisals and related material for non-SES appointees as defined in 5 USC 4301(2). See also PE-25-14a-e.</p> <p><i>Retention Schedule: N1-305-07-1-GRS-1/21</i> <i>Retain while Active + 60 years, and then destroy.</i> <i>Active period ends upon employee separation.</i></p>	NHS
PE-46-13c	<p>Employment-Related Medical Records</p> <p>Workers' Compensation 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. See also PE-25-14a-e. The official file is the Department of Labor (DOL) file. When the employee separates, the files are retained by the agency. NPRC will destroy 75 years after birth date of employee, 60 years after date of the earliest document in the folder, if the date of birth cannot be ascertained, or 30 years after latest separation, whichever is later.</p> <p><i>Retention Schedule: N1-305-07-1-GRS-1/21</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Active period ends upon employee separation.</i></p>	NHS
PE-46-14	<p>Employee Assistance Program</p> <p>Material relating to psychological testing, evaluation and counseling of employees and their families and files for alcohol and drug abuse counseling.</p> <p><i>Retention Schedule: N1-305-07-1-7/c</i> <i>Retain for 12 years and then destroy.</i></p>	NHS
PE-46-15	<p>Statistical Summaries</p> <p>Statistical summaries and reports with related documents about employee health.</p> <p><i>Retention Schedule: GRS-1/22</i> <i>Retain for 2 years and then destroy.</i></p>	NHS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-46-16	<p>Audiometric</p> <p>Material relating to the supporting audiometric documentation including calibration records from the vendor and the vendor's analysis of record ability of any case.</p> <p><i>Retention Schedule: N1-305-07-1-GRS-1/21</i> <i>Retain while Active + 60 years, and then destroy.</i> <i>Active period ends upon employee separation.</i></p>	NF
PE-47	<p>Benefits</p> <p>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. See also FI-19-22, Insurance Deductions.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NHO
PE-47-15	<p>Leave Transfer Program</p> <p>Material relating to the receipt and donation of leave for medical emergencies, including recipient applications, agency approvals or denials, medical certifications and similar documentation. See also FI-19-12, Employee Payroll Folders.</p> <p><i>Retention Schedule: GRS-1/37</i> <i>Retain while Active + 1 years, and then destroy.</i> <i>Destroy 1 year after the end of the year in which the file is closed.</i></p>	NHS
PE-49	<p>Employee Services</p> <p>Material relating to programs such as smoking cessation, fitness facility and childcare.</p> <p><i>Retention Schedule: N1-305-07-1-7/c</i> <i>Retain for 5 years and then destroy.</i></p>	NHS
PE-50	<p>Career Counseling Program</p> <p>Material relating to counseling about career enhancement opportunities or personal development programs which may increase an employee's qualifications for higher-level positions.</p> <p><i>Retention Schedule: N1-305-07-1-7/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	NHQ

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-52	<p>Mobilization Readiness</p> <p>Directives and plans issued by BPA.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain until superseded, then destroy.</i></p>	NH
PE-53	<p>Occupational Safety Program</p> <p>Material relating in general to Occupational Safety Program other than specific material described by the following tertiary subjects.</p> <p><i>Retention Schedule: N1-305-07-1-14/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	NF
PE-53-11	<p>Personal Injury</p> <p>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.</p> <p><i>Retention Schedule: GRS-1/31</i> <i>Retain while Active + 6 years, and then destroy.</i> <i>Active period ends upon termination of compensation or when deadline for filing a claim has passed.</i></p>	NF,NHS
PE-53-12	<p>Fatalities</p> <p>Material relating to incidents resulting in the death of a Federal employee or contractor performing duties for BPA. Also includes 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.</p> <p><i>Retention Schedule: N1-305-07-1-14/d</i> <i>Retain while Active + 75 years, and then destroy.</i> <i>Active period ends upon closure of case.</i></p>	NF,L
PE-53-13	<p>Motor Vehicle Accidents</p> <p>Material relating to accidents involving Federal vehicles or occurring at a BPA facility or BPA right-of-way.</p> <p><i>Retention Schedule: GRS-10/5</i> <i>Retain while Active + 6 years, and then destroy.</i> <i>Active period ends upon closure of case.</i></p>	NF,L

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-53-14	<p>Employee Driving Records</p> <p>Material relating to individual employee operations of Government-owned vehicles, including driver tests, authorization to use, safe driving awards and related correspondence.</p> <p><i>Retention Schedule: GRS-10/4</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	Z
PE-53-15	<p>Employee Claims for Property Loss</p> <p>Material relating to accountability for personal property lost or stolen. See also LW-19-11, Torts.</p> <p><i>Retention Schedule: GRS-18/15(a)</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon closure of claim.</i></p>	NF,L
PE-53-16	<p>Private Party Claims</p> <p>Material relating to accountability for personal property lost or stolen. See also LW-19-11, Torts.</p> <p><i>Retention Schedule: GRS-18/15(a)</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon closure of claim.</i></p>	NF
PE-53-17	<p>Safety Management</p> <p>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 work-sites. See also SS-18-15, Vandalism, Theft and Other Incidents.</p> <p><i>Retention Schedule: NI-305-07-1-14/c</i> <i>Retain for 10 years and then destroy.</i></p>	<p>NF, TFC, TFD, TFE, TFL, TFK, TFKB, TFKC, TFKD, TFKE, TFKF, TFKI, TFKJ, TFKV, TFKZ, TFL, TFN, TFO, TFP, TFR, TFS, TFV, TFW</p>

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-54a	<p>Drug and Alcohol Testing- Drug Test Plans and Procedures</p> <p>Material relating to the mandatory Drug and Alcohol Program EXCLUDING documents that are filed in record sets of formal issuances (directives, procedure handbooks and operating manuals). Included are employee drug and alcohol testing notices, test results and supporting documents. (a) Drug test plans and procedures with related drafts, correspondence, memoranda and other records pertaining to the development of procedures for drug testing programs, including the determination of testing incumbents in designated positions.</p> <p><i>Retention Schedule: GRS-1/36</i> <i>Retain for 3 years and then destroy.</i></p>	NHS
PE-54b	<p>Drug and Alcohol Testing - Forms</p> <p>Employee acknowledgment of notice forms.</p> <p><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Active period ends when employee separates from testing-designated position.</i></p>	NHS
PE-54c	<p>Drug and Alcohol Testing - Selection/Scheduling Records</p> <p>(c) Records relating to the selection of specific employees/applicants for testing and the scheduling of tests. Included are lists of selectees, notification letters and testing schedules.</p> <p><i>Retention Schedule: N1-305-07-1-14/b</i> <i>Retain for 3 years and then destroy.</i></p>	NHS
PE-54d	<p>Drug and Alcohol Testing</p> <p>(d) Records relating to the collection and handling of specimens. (1) "Record Books" are bound books containing identifying data on each specimen recorded at each collection site in the order in which the specimens were collected. (2) Chain of custody records. Forms and other records used to maintain control and accountability of specimens from the point of collection to the final disposition of the specimen.</p> <p><i>Retention Schedule: N1-305-07-1-14/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>(1) Destroy 3 years after date of last entry. (2) Destroy when 3 years old.</i></p>	NHS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-54e	<p data-bbox="391 363 857 384">Drug and Alcohol Testing - Test Results</p> <p data-bbox="391 411 1243 527">(1) Positive results (a) Employees- Destroy when employee leaves the agency or when 3 years old, whichever is later. (b) Applicants not hired- Destroy when 3 years old. (2) Negative results- Destroy when 3 years old. Based on GRS-1/36.</p> <p data-bbox="391 548 927 604"><i>Retention Schedule: N1-305-07-1-14/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	NHS
PE-57	<p data-bbox="391 678 922 699">Reasonable Accommodation Request Records</p> <p data-bbox="391 726 1243 1371">Information created and maintained while receiving, coordinating, reviewing, processing, approving and reporting requests for reasonable accommodation from federal employees and applicants under the Rehabilitation Act of 1973 and Executive Order 13164. A reasonable accommodation is a change in the work environment or in the way things are customarily done that would enable an individual with a disability to enjoy equal employment opportunities. The three categories of reasonable accommodation are: Modification or adjustments to a job application process to permit an individual with a disability to be considered for a job, such as providing application forms in large print or Braille, Modifications or adjustments necessary to enable a qualified individual with a disability to perform essential functions of the job, such as providing sign language interpreters and Modifications or adjustments that enable employees with disabilities to enjoy equal benefits and privileges of employment, such as removing physical barriers in an office or cafeteria. This schedule includes all request for reasonable accommodation and/or assistive technology devices and services offered through an agency or the Computer/Electronic Accommodation Program (CAP) that are made by or on behalf of applicants, current or former employees. Also included are medical records, supporting notes and documentation, as well as procedures and records related to processing, deciding, implementing and tracking requests for reasonable accommodations(s). Based on GRS 1/24.</p> <p data-bbox="391 1392 816 1444"><i>Retention Schedule: N1-305-07-1-7/a</i> <i>Retain for 0 years and then destroy.</i></p>	NHS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-57-11	<p>Reasonable Accommodation - General Files</p> <p>Agency-wide and departmental procedures for receiving, processing and appealing requests for reasonable accommodation by employees and applicants. Files may include, but are not limited to instructions, directives, notices, forms, timetables and guidelines for requesting, processing and approving requests and for appealing decisions for reasonable accommodation. Also included are records notifying the Equal Employment Opportunity Commission (EEOC), agency's collective bargaining representative(s) and the agency's Equal Employment Opportunity office of the agency's reasonable accommodation request and processing procedures as well as modifications to established procedures.</p> <p><i>Retention Schedule: GRS-1/24(a)</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	NHS
PE-57-12	<p>Reasonable Accommodations - Employee Case Files</p> <p>Individual employee files that are created, received and maintained by EEO reasonable accommodation or diversity/disability program or employee relations coordinators, immediate supervisors, CAP administrator or HR specialists containing records of requests for reasonable accommodation and/or assistive technology devices and services through the agency or CAP that have been requested for or by an employee. This series also includes, but is not limited to request approvals and denials, notice of procedures for informal dispute resolution or appeal processes, forms, correspondence, emails, records of oral conversations, medical documentation and notes.</p> <p><i>Retention Schedule: GRS-1/24(b)</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Destroy three years after employee separation from the agency or all appeals are concluded, whichever is later. Note: These records are neither part of an employee's Official Personnel File (OPF) nor part of a supervisor's unofficial personnel file.</i></p>	NHS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-57-13	<p>Reasonable Accommodations - Supplemental Files</p> <p>Records created, received and maintained by EEO reasonable accommodation or diversity/disability program or employee relation coordinators while advising on, implementing or appealing requests for or from an individual employee for reasonable accommodation. Some requests may involve HR matters, including but not limited to changes in duties, reassignments, leave usage and performance issues. Files may include, but are not limited to policy guidance, resource information about accommodation providers, forms, emails and notes.</p> <p><i>Retention Schedule: GRS-1/24(c)</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends after the close of the fiscal year in which accommodation is decided or all appeals are concluded, whichever is later. Note: These records are neither part of an employee's Official Personnel File (OPF) nor part of a supervisor's unofficial personnel file.</i></p>	NHS
PE-57-14	<p>Reasonable Accommodations - Tracking System</p> <p>Records and data created, received, and maintained for purposes of tracking agency compliance with Executive Order 13164 and Equal Employment Opportunity Commission (EEOC) guidance.</p> <p><i>Retention Schedule: GRS-1/24(d)</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Delete/destroy three years after compliance report is filed.</i></p>	NHS
PEa	<p>Personnel - Objectives, Policy, Procedures and Operations of Personnel Activities</p> <p>Material relating to objectives, policy, procedures and operations of personnel activities excluding records specifically described elsewhere in this schedule and records maintained at agency staff planning levels.</p> <p><i>Retention Schedule: GRS-1/3</i> <i>Retain for 3 years and then destroy.</i></p>	Z
PEb	<p>Personnel - Individual Employee Records Not Included In OPF File</p> <p>Operating personnel office records relating to individual employees not maintained in Official Personnel Folders (OPFs) and not provided for elsewhere in this Schedule.</p> <p><i>Retention Schedule: NI-305-07-1-7/b</i> <i>Retain for 1 years and then destroy.</i></p>	NH

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PE-57-13	<p>Reasonable Accommodations - Supplemental Files</p> <p>Records created, received and maintained by EEO reasonable accommodation or diversity/disability program or employee relation coordinators while advising on, implementing or appealing requests for or from an individual employee for reasonable accommodation. Some requests may involve HR matters, including but not limited to changes in duties, reassignments, leave usage and performance issues. Files may include, but are not limited to policy guidance, resource information about accommodation providers, forms, emails and notes.</p> <p><i>Retention Schedule: GRS-1/24(c)</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends after the close of the fiscal year in which accommodation is decided or all appeals are concluded, whichever is later. Note: These records are neither part of an employee's Official Personnel File (OPF) nor part of a supervisor's unofficial personnel file.</i></p>	NHS
PE-57-14	<p>Reasonable Accommodations - Tracking System</p> <p>Records and data created, received, and maintained for purposes of tracking agency compliance with Executive Order 13164 and Equal Employment Opportunity Commission (EEOC) guidance.</p> <p><i>Retention Schedule: GRS-1/24(d)</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Delete/destroy three years after compliance report is filed.</i></p>	NHS
PEa	<p>Personnel - Objectives, Policy, Procedures and Operations of Personnel Activities</p> <p>Material relating to objectives, policy, procedures and operations of personnel activities excluding records specifically described elsewhere in this schedule and records maintained at agency staff planning levels.</p> <p><i>Retention Schedule: GRS-1/3</i> <i>Retain for 3 years and then destroy.</i></p>	Z
PEb	<p>Personnel - Individual Employee Records Not Included In OPF File</p> <p>Operating personnel office records relating to individual employees not maintained in Official Personnel Folders (OPFs) and not provided for elsewhere in this Schedule.</p> <p><i>Retention Schedule: NI-305-07-1-7/b</i> <i>Retain for 1 years and then destroy.</i></p>	NH

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PM	<p>Power Marketing</p> <p>Material relating to rate determination, revenue requirements and to customer services such as contract development and administration for power acquisition, sales, exchange, transmission and power billing. FERC refers to Federal Energy Regulatory Commission. All records are scheduled in media neutral format.</p> <p><i>Retention Schedule: NI-305-07-1</i></p>	
PM-11	<p>Customer Relations</p> <p>Power contracting and power billing material for specific customers.</p> <p><i>Retention Schedule: NI-305-07-1-2/a</i> <i>Retain until superseded, then destroy</i></p>	<p>PGF,PSE,PSS PSW,PT,PTC PTF,PTL,PTM</p>
PM-11-11	<p>Contract Management System</p> <p>All material regarding contract support activities.</p> <p><i>Retention Schedule: NI-305-07-1-9/a</i> <i>Retain until superseded, then destroy</i></p>	KSC,PSSE
PM-11-12	<p>Contract Development and Negotiation</p> <p>All material regarding the development of contract policy, principles, terms and contract negotiations.</p> <p><i>Retention Schedule: NI-305-07-1-9/a</i> <i>Retain until superseded, then destroy</i></p>	<p>PFP,PSS,PSSE PSW</p>
PM-11-13	<p>Contract Administration</p> <p>Material related to the administering of all contracts.</p> <p><i>Retention Schedule: NI-305-07-1-9/a</i> <i>Retain until superseded, then destroy</i></p>	KSC,PSSE

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PM-11-14	<p>Contracts, Original Signed</p> <p>Contracts for all types of power transactions; original signed contracts. Includes Short Term Confirmation Agreements. For Master Authenticated Contracts see ES-09-05 (CCIS).</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active&nbsp;period ends upon termination of the contract.</i></p>	KSC,PSS,PSSE PSW,PTC
PM-11-15	<p>Contracts, Authenticated Work Copies</p> <p>Copies for active use in various headquarters and regional organization.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	PSS,PSSE,PSW
PM-11-16a	<p>Draft Contract Material - Executed Contracts</p> <p>(a) Executed Contracts Material related to contract formulation.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active peroid ends upon termination of the contract.</i></p>	PSS,PSSE,PSW
PM-11-16b	<p>Draft Contract Material - Nonexecuted Contracts</p> <p>(b) Non-executed contract material related to contract formulation.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active peroid ends upon termination of the contract.</i></p>	KSC,PSS,PSSE PSW
PM-11-17a	<p>Billing Source Data - Electronic Data (Do Not Use/See PM-11-19 and PM-11-20)</p> <p>Data obtained by BPA to form and support customer bills. (Formerly entitled Meter Slips.) Source data for PM-11-19, Billings. (a) Electronic Data. Note: Electronic storage began with 1995 data; imaging and storage on CD-ROM began in 1996.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i> <i>BPA's Power & Transmission Customer Bills and Billing backup will be filed in PM-11-19 and PM-11-20 5/1/2010. Do Not Delete this file code until all associated records in either ERMS or Records Storage have been destroyed.</i> VITAL RECORD</p>	KSB

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PM-11-17b	<p>Billing Source Data - Hardcopy records (Do Not Use/See PM-11-19 and PM-11-20)</p> <p>Hardcopy meter slips, Demand Graph (DG) charts, Print Demand (PD-57), tapes and other hardcopy data.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i> <i>BPA's Power & Transmission Customer bill and Billing Backups will be filed in PM-11-19 and PM-11-20 5/1/2010. Do Not Delete this file code until all associated records in ERMS or Records Storage have been destroyed.</i> VITAL RECORD</p>	KSB
PM-11-19	<p>Power and Transmission Customer Billing</p> <p>BPA's Power and Transmission customer bills. Bill Package to include billing source data, metering and scheduling data.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i> <i>Includes TM-18, TM-18-11 and TM-18-12. Bill Package stored electronically in BILS.</i> VITAL RECORD</p>	KSB
PM-11-20	<p>Power and Transmission Billing Back-up</p> <p>BPA's Power and Transmission customer bills and all associated supporting documentation to include related notes and correspondence.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i> <i>Includes TM-18, TM-18-11 and TM-18-12 Billing back-up stored electronically in BILS.</i> VITAL RECORD</p>	KSB
PM-12-11a	<p>Power Sales</p> <p>Material on power sales marketing, negotiation and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	FPF,PSE,PSW PT,PTC,PTF PTL,PTM

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PM-12-11b	<p>Power Sales</p> <p>Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	FRS,PSE,PSW PT,PTC,PTF,PTK PTL,PTM
PM-12-12a	<p>Storage</p> <p>Energy and water storage policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-12b	<p>Storage</p> <p>Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-13a	<p>Exchange</p> <p>Energy exchange issues, policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-13b	<p>Exchange</p> <p>Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL

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PM-12-14a	<p>Exchange Transmission</p> <p>Transmission credit agreements and policies. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-14b	<p>Exchange Transmission</p> <p>Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-15a	<p>Service and Exchange</p> <p>Service and exchange policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-15b	<p>Service and Exchange</p> <p>Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-16a	<p>Trust/Customer Service Reimbursable</p> <p>Trust policies, accounts and contracts, reimbursable policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-5/d</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PM-12-16b	<p>Trust/Customer Service Reimbursable</p> <p>Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-17a	<p>Operation and Maintenance</p> <p>Material on operation and maintenance projects, policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-11/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-17b	<p>Operation and Maintenance</p> <p>Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-11/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-18a	<p>Transmission</p> <p>Transmission and intertie policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-18b	<p>Transmission</p> <p>Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PM-12-19a	<p>Transfer</p> <p>Transfer policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-19b	<p>Transfer</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-20a	<p>Voltage Regulator</p> <p>Material on voltage regulators, related policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-5/d</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-20b	<p>Voltage Regulator</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-21a	<p>Lease</p> <p>Lease policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL

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PM-12-21b	<p>Lease</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-22a	<p>Cogeneration</p> <p>Cogeneration issues, policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-22b	<p>Cogeneration</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-23a	<p>Other Power Transactions</p> <p>Contracting which does not easily fall into any specialized definition of contract type. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-23b	<p>Other Power Transactions</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PM-12-24a	<p>Residential Purchase and Exchange</p> <p>Material on residential purchase and exchange policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-24b	<p>Residential Purchase and Exchange</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-25a	<p>Conservation & Energy Resources Issues</p> <p>Material on conservation and energy resources issues, policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-13/c/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-25b	<p>Conservation and Energy Resources Issues</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-26a	<p>Purchase</p> <p>Material on purchase contracting regarding power issues, not procurement issues. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL

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PM-12-26b	<p>Purchase</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-27a	<p>Residential Exchange</p> <p>Residential exchange policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-5/d</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-27b	<p>Residential Exchange</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-28a	<p>Intertie Assured Access</p> <p>Intertie access issues, policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-4/d</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-28b	<p>Intertie Assured Access</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PM-12-29a	<p>Construction</p> <p>Material on construction issues and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-11/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-29b	<p>Construction</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12-30a	<p>Emergency</p> <p>Emergency repair and maintenance issues, policies and contracting. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-11/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
PM-12-30b	<p>Emergency</p> <p>(b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTL
PM-12a	<p>Power Transactions - Policies and Procedures Governing Sale of Energy</p> <p>Material relating to the type of power transaction including policies, procedure and developmental material. (a) Work folders consisting of correspondence and other material establishing BPA's policies and procedures governing the sale of energy.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 21 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PFP,PS,PSSE PSW,PTC,PTL

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PM-12b	<p>Power Transactions - Format and Content of Energy Sales Agreements</p> <p>Material relating to the type of power transaction including policies, procedure and developmental material. (b) Correspondence regarding format and content of energy sales agreements, prototype agreements, letter agreements and other related matters except when concerning a specific contract.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PSS,PSSE,PSW PTC,PTL
PM-13-11	<p>Responses to Power Planning Council Requirements</p> <p>Case file by section/subsection of the Act.</p> <p><i>Retention Schedule: NI-305-07-1-3/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PFR
PM-13-12	<p>Pre-Initial Proposal</p> <p>Material on rate case discussions/communications with customers/parties with proper notice, before Initial Proposal in 7(i) process.</p> <p><i>Retention Schedule: NI-305-07-1-3/b</i> <i>Retain for 5 years and then destroy.</i></p>	PFR
PM-13-13	<p>Wholesale Power Rate</p> <p>Case file includes all background, supporting material and Tiered Rates. (Rate Case related to power rate determinations.)&nbsp;Includes how BPA sets rates for the Regional Dialogue contract period. See also PM-16, Rate Filing and Hearings, FI-28, Revenue Requirements and FI-29, Repayment.</p> <p><i>Retention Schedule: NI-305-07-1-3/d</i> <i>Retain for 50 years and then destroy.</i></p>	PFR
PM-14	<p>Rate Analysis</p> <p>Case file of rate analysis in all media.</p> <p><i>Retention Schedule: NI-305-07-1-3/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PFR

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PM-14-11	<p>Historical Rate Database Printouts</p> <p>Includes Revenue Information System (RIS) and Variable Industrial Data Printouts.</p> <p><i>Retention Schedule: NI-305-07-1-3/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PFR
PM-14-12	<p>Rate Analysis Model (RAM)</p> <p>Testimony and responses to data requests.</p> <p><i>Retention Schedule: NI-305-07-1-3/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PFR
PM-14-16	<p>Cost of Service Analysis</p> <p>Wholesale Power Rate Development Study (WPRDS). Testimony and responses to data requests.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PFR
PM-14-17	<p>Marginal Cost Analysis</p> <p>BPA Rate Case Studies performed to identify the costs BPA would incur to generate and transmit electricity on a seasonal, daily and hourly basis as a result of serving additional capacity and load.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PFR
PM-14-19	<p>Long Range Incremental Cost</p> <p>Studies performed on the cost of incremental but defined resource additions to capacity which can be expected to be added over a specific longer term planning horizon.</p> <p><i>Retention Schedule: NI-305-07-1-3/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PFR
PM-14-20	<p>Low Density Discount</p> <p>Material on the Low Density Discount policy and implementation issues.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PFR

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PM-14-21	<p>Customer Schedules and Studies</p> <p>Retail Rate Schedules Tariffs.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PFR
PM-14-22	<p>Retail Industrial Market</p> <p>Material on retail markets, including Partnership Program and sector data.</p> <p><i>Retention Schedule: N1-305-07-1-3/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PFR
PM-14-23	<p>Energy Northwest Projects</p> <p>Material on the five nuclear power projects sponsored by Energy Northwest.</p> <p><i>Retention Schedule: N1-305-07-1-3/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PGC
PM-14-24	<p>Non Federal Power Generation Projects</p> <p><i>Retention Schedule: N1-305-07-1-3/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PGC
PM-15	<p>Rate Forecasts</p> <p>Rate Forecasts Case file rate forecasts using the following tertiary subjects as needed.</p> <p><i>Retention Schedule: N1-305-07-1-3/c</i> <i>Retain for 10 years and then destroy.</i></p>	PFR
PM-15-11	<p>Load Forecasts</p> <p>Load Forecasts Material on forecasts of future energy or peak demand by customer class or sector.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain for 10 years and then destroy.</i></p>	KSL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PM-15-12	<p>Outyear Forecasts</p> <p>Outyear Forecasts Material on any forecast of rates, revenues, loads or other factors which extends over a specific longer term planning horizon. See also PM-15 Rate Forecasts.</p> <p><i>Retention Schedule: NI-305-07-1-3/c</i> <i>Retain for 10 years and then destroy.</i></p>	KSL
PM-15-13	<p>Revenue Forecasts</p> <p>Includes Non-Firm Revenue Analysis Program-Revenue Estimates (NFRAP-REVEST) printouts.</p> <p><i>Retention Schedule: NI-305-07-1-3/c</i> <i>Retain for 10 years and then destroy.</i></p>	PFB
PM-16	<p>Rate Filings and Hearings</p> <p>Includes all material related to rate filings and hearings. See also FI-28, Revenue Requirements, FI-29, Repayment and LW-28-11, BPA Rate Hearings.</p> <p><i>Retention Schedule: NI-305-07-1-3/d</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	PFR
PM-16-11	<p>Schedules and Charts</p> <p>Material on scheduling rate cases and charts of processes.</p> <p><i>Retention Schedule: NI-305-07-1-3/d</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	PFR
PM-16-12	<p>Ex Parte</p> <p>Material on discussion/communications with individual parties to a rate case without proper notice to all parties.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/1</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	PFR
PM-16-13	<p>Official Rate Case Record</p> <p><i>Retention Schedule: NI-305-07-1-3/d</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	PFR

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PM-17	<p data-bbox="391 363 456 384">Slice</p> <p data-bbox="391 411 1235 562">Material relating to the Slice of the System product which is based upon a customer's annual net firm requirements load and mapped to provide power in the shape of BPA's generation from Federal System Resources over the year. Materials include rates information, Slice studies, etc. The Slice system means the Federal generating resources that support the sale of Slice Output.</p> <p data-bbox="391 579 813 600"><i>Retention Schedule: NI-305-07-1-2/c</i></p> <p data-bbox="391 611 927 632"><i>Retain while Active + 7 years, and then destroy.</i></p> <p data-bbox="391 642 971 663"><i>Active period ends upon termination of the contract.</i></p>	PGL
PM-17-11	<p data-bbox="391 741 683 762">Slice Customer Relations</p> <p data-bbox="391 789 1154 842">Material relating to interactions with Slice customers such as meetings, meeting notes, correspondence, forecast explanations, etc.</p> <p data-bbox="391 863 813 884"><i>Retention Schedule: NI-305-07-1-2/c</i></p> <p data-bbox="391 894 927 915"><i>Retain while Active + 7 years, and then destroy.</i></p> <p data-bbox="391 926 971 947"><i>Active period ends upon termination of the contract.</i></p>	PGL
PM-17-12	<p data-bbox="391 1024 1097 1045">Slice Contract Development, Negotiation, and Administration</p> <p data-bbox="391 1073 1243 1094">Material relating to Slice contract development, negotiation and administration.</p> <p data-bbox="391 1115 813 1136"><i>Retention Schedule: NI-305-07-1-2/c</i></p> <p data-bbox="391 1146 927 1167"><i>Retain while Active + 7 years, and then destroy.</i></p> <p data-bbox="391 1178 971 1199"><i>Active period ends upon termination of the contract.</i></p>	PGL
PM-17-13	<p data-bbox="391 1276 553 1297">Slice True-Up</p> <p data-bbox="391 1325 1227 1409">Materials relating to the Slice True-up. True-up is the annual reconciliation of annual costs versus forecasted costs. Materials include budgets, billing, correspondence, handouts, adjustment summaries, etc.</p> <p data-bbox="391 1430 813 1451"><i>Retention Schedule: NI-305-07-1-2/c</i></p> <p data-bbox="391 1461 927 1482"><i>Retain while Active + 7 years, and then destroy.</i></p> <p data-bbox="391 1493 971 1514"><i>Active period ends upon termination of the contract.</i></p>	PGL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PM-17-14	<p>Slice Operations</p> <p>Material relating to energy transfer, dynamic scheduling, Slice Storage Deviation Account (SSDA) and update to customers. Slice Storage Deviation Account means an account that reflects the ability to schedule its Slice output amounts in a manner that either places energy into storage or removes energy from storage.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends upon termination of the contract.</i></p>	PGL
PM-17-15	<p>Slice Transmission Issues</p> <p>Material relating to Slice TBL or PBL Transmission issues such as operating reserves, ancillary services, etc.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends upon termination of the contract..</i></p>	PGL
PM-17-16	<p>Slice Dispute Resolution</p> <p>Material relating to Slice Dispute Resolution.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends upon termination of the contract.</i></p>	PGL
PM-17-17	<p>Slice Computer Application Transactional Information</p> <p>Material relating to scheduling transactional data and other communications via automated processes, scheduling requests and approvals, communication of operational limits, communication of actual operational conditions and customer operations.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends upon termination of the contract.</i></p>	PGL
PM-17-18	<p>Slice Computer Application (SCA)</p> <p>Scheduling data that is pertinent to Slice activity. Based on GRS 20/5.</p> <p><i>Retention Schedule: NI-305-07-1-3/a</i> <i>Retain while Active + 0 years, and then destroy.</i> <i>Active period ends when the agency determines that they are no longer needed for administrative, legal, audit or other operational purposes.</i></p>	NJSC

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
PM-17-19	<p>Slice Computer Applications (SCA) - Documentation</p> <p>Data systems specifications, file specifications, codebooks, record layouts, user guides, output specifications and final reports relating to a master file or database. Based on GRS 20/11.</p> <p><i>Retention Schedule: NI-305-07-1-18/a</i> <i>Retain until superseded, then destroy</i></p>	NJSC
PM-18	<p>Voice Recordings of Supply Reservations, Pre-Schedule and Real-Time</p> <p>Voice recordings of Power Supply main functions, including Trading Floor, Pre-schedule, Real-time and After-the-Fact business transactions and issue resolution with customers.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PTF,PTK

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RE	<p>Strategy Integration</p> <p>Material relating to the development, implementation and management of Industry Restructuring. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
RE-11	<p>Market Monitoring/Price Mitigation (Strategy Integration)</p> <p>Reports and supporting materials used to document market monitoring and price mitigation policies, procedures, rules, orders and other activities about or related to Industry Restructuring. This includes interactions with the Seams Steering Group Western Interconnection (SSGWI), Federal Energy Regulatory Commission (FERC) and other related coordination or oversight entities.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-12	<p>Congestion Management/Cataloguing (Strategy Integration)</p> <p>Reports and supporting materials used to document (1) mechanisms and procedures used under Industry Restructuring to manage, clear and price transmission congestion (2) cataloguing of Pre-Existing Transmission Agreements and (3) resolution of cataloguing disputes.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-13	<p>Scheduling Coordinator (Strategy Integration)</p> <p>Reports, rules, policies and other supporting materials related to scheduling coordinators including the BPA Scheduling Coordinator's role. Scheduling Coordinators (SC) are entities that are financially and operationally qualified to do business with Filing Utilities. This information includes: operational, financial, policy, technical, Seams and implementation information.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RE-14	<p>Operations (Strategy Integration)</p> <p>Reports, policies, procedures, methodologies and other information related to the operational aspects of industry restructuring. This includes technical, financial, policy and procedural information related to assuring safe, reliable transmission system operations by a regional transmission organization and its participating transmission owners. Also included is information related to operations and interaction with other transmission control entities via the Seams Steering Group Western Interconnection (SSGWI), North American Energy Reliability Council (NERC) and Federal Energy Regulatory Commission (FERC) and other related coordination or oversight entities and groups.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-15	<p>Pricing (Strategy Integration)</p> <p>Documents, spreadsheets and other material used to develop Industry Restructuring pricing methodology, including company rates, grid management charge, transfer charges, export charge and losses.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-16	<p>Planning/Expansion (Strategy Integration)</p> <p>Reports and supporting materials used to document the analysis of the capability of the transmission system and the study of alternatives to meet the future needs of the system for commercial, adequacy and/or reliability purposes.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-17	<p>Billing and Settlements (Strategy Integration)</p> <p>Reports and supporting materials used to document how a regional transmission organization will complete financial transactions with system users. It will cover the process in which a regional transmission organization will send records to each Scheduling Coordinator (SC) regarding the transactions they have done with and through this entity (both in terms of MWhr quantities and associated costs) for the SC to validate or dispute and then will be followed up with a dispute resolution process and ultimately, invoicing for payment.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RE-18	<p>Industry Restructuring Issues (Seams)</p> <p>Reports and supporting materials used to document Industry Restructuring 'Seams' issues, policies, procedures, rules, orders and other activities. This includes organizational interactions with the Seams Steering Group Western Interconnection (SSGWI) and Federal Energy Regulatory Commission (FERC) and other related coordination or oversight entities.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-19	<p>Benefit/Cost (Strategy Integration)</p> <p>Reports and supporting materials used to document benefit and cost studies.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-20	<p>Liability and Risk Management (Strategy Integration)</p> <p>Material relating to Industry Restructuring Risk Management, reports and supporting materials used to document review of program areas for liability and susceptibility to loss or unauthorized use of resources, errors in reports and information and illegal and unethical actions.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-21	<p>Generation Integration/Load Integration (Strategy Integration)</p> <p>Reports, analyses, procedures and supporting materials related to interconnection and integration of generation and load through a regional transmission organization processes.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-22	<p>Tariff (Strategy Integration)</p> <p>Reports, analyses, policies, procedures and supporting materials related to the development, filing, implementation and interpretation of a regional transmission organization Tariff.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RE-23	<p>Ancillary Services (Strategy Integration)</p> <p>Reports and analysis of various proposals for the provision of Ancillary Services to transmission customers and the supply of generation inputs to a regional transmission organization.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-24	<p>Transmission Operating Agreement (Strategy Integration)</p> <p>Reports, analyses, policies, procedures and supporting materials related to the development, filing, implementation and interpretation of the Transmission Operating Agreement (TOA) between BPA and a regional transmission organization.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-25	<p>Governance (Strategy Integration)</p> <p>Reports, analyses, policies, procedures related to governance of a regional transmission organization, including its Board of Trustees, Board Advisory Committee and Subcommittees.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-26	<p>Paying Agent (Strategy Integration)</p> <p>Reports, policies, rules and other materials related to Paying Agents, their duties and purposes.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-27	<p>Canadian Participation (Strategy Integration)</p> <p>Reports, analyses, policies and other materials related to the interrelationship of a regional transmission organization with Canadian entities, including transmission providers, customers and regulatory authorities.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RE-28	<p>Taxation (Strategy Integration)</p> <p>Reports, analyses, decisions and other materials related to taxation of a regional transmission organization.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-29	<p>Facility Inclusion (Strategy Integration)</p> <p>Reports and supporting material used to document Facility Inclusion guidelines/policies for development of a regional transmission organization.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR
RE-30	<p>Resource Adequacy (Strategy Integration)</p> <p>Reports, analysis, PowerPoint presentations, meeting minutes and other materials related to the development and implementation of a Regional Resource Adequacy Standard and Metric.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 6 years and then destroy.</i></p>	SR

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Last Revision Date: September 10, 2009

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RK	<p>Risk Management</p> <p>Material relating to all aspects of risk management as it relates to BPA's internal matters. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
RK-11	<p>Risk Management Charters, Policies and Procedures</p> <p>Material relating to risk management charters, policies and procedures.</p> <p><i>Retention Schedule: N1-305-07-1-5/c</i> <i>Retain until superseded plus 7 years and then destroy.</i></p>	DB
RK-12	<p>Risk Management-Insurance</p> <p>Includes commercial insurance policies purchased by BPA, participation in nuclear insurance pools, certain self-insured and uninsured risks, Washington Public Power Supply System insurance program, Trojan Nuclear Power Plant insurance and brown/black-out insurance.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years and then destroy.</i></p>	DB,DBC
RK-12-11	<p>Risk Management - Losses and Claims</p> <p>Material relating to amounts recovered from insurance policies due to losses and other claims by BPA and financing of both property and liability loss exposure.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain while Active + 7 years and then destroy.</i> <i>Active period ends when claim is closed.</i></p>	DB,DBC
RK-13	<p>Enterprise Risk Management</p> <p>Reports, analysis, recommendations, models, methodologies and other information related to all aspects of Enterprise Risk Management. This includes, but is not limited to technical, financial, policy and procedural documents as they relate to Risk planning and operations.</p> <p><i>Retention Schedule: N1-305-07-1-14/c</i> <i>Retain until superseded plus 7 years and then destroy.</i> <i>Date of last modification plus 7 years and then destroy.</i></p>	DB,DBE

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RK-13-11	<p>Enterprise Risk Management Committee</p> <p>Material relating to the Enterprise Risk Management Committee. Includes minutes, agenda and handouts used to conduct the committee meetings. Additionally includes all data and materials used by the committee as decision-making tools.</p> <p><i>Retention Schedule: N1-305-07-1-14/c</i> <i>Retain until superseded plus 7 years and then destroy.</i></p>	DB,DBE
RK-14	<p>Transacting and Credit Risk Management</p> <p>Reports, analysis, recommendations, models, methodologies and other information related to all aspects of Transacting and Credit Risk Management. This includes, but is not limited to technical, financial, policy and procedural documents as they relate to Risk planning and operations.</p> <p><i>Retention Schedule: N1-305-07-1-14/c</i> <i>Retain until superseded plus 7 years and then destroy.</i></p>	DB,DBC
RK-14-11	<p>Transacting and Credit Risk Management Committee</p> <p>Material relating to the Transacting and Credit Risk Management Committee. Includes minutes, agenda and handouts used to conduct the committee meetings. Additionally includes all data and materials used by the committee as decision-making tools.</p> <p><i>Retention Schedule: N1-305-07-1-14/c</i> <i>Retain until superseded plus 7 years and then destroy.</i></p>	DB,DBC

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP	<p>Resource Planning And Forecasting</p> <p>Material relating to resource planning and forecasting, including BPA's resource strategy and generation studies. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: NI-305-07-1</i></p>	
RP-11	<p>Power Plan Issues</p> <p>Power Plan Issues Material relating to the Northwest Power Planning Council's (NWPPC) Power Plan and issues of concern, impact or interest to BPA.</p> <p><i>Retention Schedule: NI-305-07-1-2/d</i> <i>Retain while Active + 11 years, and then destroy.</i></p>	PGP,PGP
RP-14	<p>Energy and Capacity Types</p> <p>Material relating to the availability of various types of electrical power, including studies, reports and tables.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PGP
RP-16	<p>Columbia River Treaty Issues</p> <p>All treaty-related material including Columbia River Treaty (CRT), Permanent Engineering Board (PEB) and Permanent Engineering Board Committee (PEBCOM). See also LW-25-11, Treaties with Canada.</p> <p><i>Retention Schedule: NI-305-07-1-2/d</i> <i>Retain while Active + 15 years, and then destroy.</i></p>	PGP,PGPO,PGP L,PGPW
RP-16-11	<p>Canadian Projects</p> <p>Material relating to existing and new Canadian projects.</p> <p><i>Retention Schedule: NI-305-07-1-2/d</i> <i>Retain while Active + 16 years, and then destroy.</i></p>	PGP,PGPL
RP-16-12	<p>U.S. Projects</p> <p>Material relating to existing and new U.S. Projects.</p> <p><i>Retention Schedule: NI-305-07-1-2/d</i> <i>Retain while Active + 16 years, and then destroy.</i></p>	PGPL,PGPO

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP-16-13	<p>Agreements</p> <p>Agreements related to the treaty between the U.S. and Canada. See also LW-25-11, Treaties with Canada.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGP,PGPL,PGPO
RP-16-14	<p>Downstream Benefits</p> <p>Studies and reports.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGPL
RP-16-15	<p>Storage NTSA (Non Treaty Storage Agreements) and Storage Requests</p> <p>Requests, studies and reports.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGP,PGS
RP-16-16	<p>Hydro Plant Data</p> <p>Data received from Canada for use in studies and models.</p> <p><i>Retention Schedule: NI-305-07-1-2/a</i> <i>Retain until superseded, then destroy</i></p>	PGP
RP-16-17	<p>Hydrometeorology</p> <p>Data, policy and procedures related to hydroelectric meteorology. Does not include meeting minutes, agenda and related material.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGPW

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP-16-18a	<p>Assured Operating Plan</p> <p>Assured Operating Plan (AOP) and supporting documentation for the operation of the Columbia River Treaty storage in Canada. (a) Hardcopy</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 20 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGPL
RP-16-18b	<p>Assured Operating Plan</p> <p>(b) Microfilm (COM).</p> <p><i>Retention Schedule: NI-305-07-1-2/e/1</i> <i>Retain for 30 years and then destroy.</i></p>	PGPL
RP-16-19a	<p>Assured Operating Plan Hydroelectric Studies</p> <p>Materials pertaining to the hydroelectric studies performed in support of the Assured Operating Plan. (a) Hardcopy</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 20 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGPL
RP-16-19b	<p>Assured Operating Plan Hydroelectric Studies</p> <p>(b) Microfilm (COM).</p> <p><i>Retention Schedule: NI-305-07-1-2/e/1</i> <i>Retain for 30 years and then destroy.</i></p>	PGPL
RP-16-20a	<p>Detailed Operating Plan</p> <p>Detailed operating plan (DOP) and supporting documents. (a) Hardcopy</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 20 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGPL
RP-16-20b	<p>Detailed Operating Plan</p> <p>(b) Microfilm.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/1</i> <i>Retain for 30 years and then destroy.</i></p>	PGPL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP-16-21a	<p>Entity Report</p> <p>Entity Report Reports from the Canadian entity (BC Hydro) and the U.S. entity (BPA, Corps of Engineers). (a) Hardcopy</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 20 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGPL
RP-16-21b	<p>Entity Report</p> <p>(b) Microfilm.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/1</i> <i>Retain for 30 years and then destroy.</i></p>	PGPL
RP-17	<p>Resource Acquisitions</p> <p>Material relating to resource acquisitions. See also RP-24, Power Project Evaluations and Analyses.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 8 years, and then destroy.</i></p>	PGC
RP-17-11	<p>Acquisition Methods</p> <p>Documentation of terms and conditions of purchase agreements outside BPA.</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain while Active + 15 years, and then destroy.</i></p>	PTL
RP-17-12	<p>Small Resources Program</p> <p>Documentation of issues and criteria for acquisitions by any party and in various states.</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain while Active + 15 years, and then destroy.</i></p>	PTL
RP-17-13	<p>Lost Opportunity Resources</p> <p>Material relating to programs, policies, evaluation criteria and similar documentation for lost opportunity generating resources.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 8 years, and then destroy.</i></p>	PTL

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RP-17-15	<p>Pre-Construction Assistance Program</p> <p>Material pertaining to BPA-provided assistance (financial and technical) for implementation of conservation measures prior to construction.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 8 years, and then destroy.</i></p>	PTL
RP-18	<p>Economic Analysis</p> <p>Material relating to economic (cost and income) analysis. See also RP-24, Power Project Evaluations and Analyses.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGP
RP-18-11	<p>Analytical Tools/Modeling Techniques</p> <p>Material relating to the following models: ISAAC, CPAM, MICROFIN, SDSM, SAM, plus decision analysis optimization/simulation models.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	PGP
RP-18-14	<p>Marketing</p> <p>Material relating to analysis of capacity and energy computer modeling techniques, development and utilization.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	PGP
RP-20	<p>Non-Federal Development at Federal Facilities</p> <p>File general material using the following tertiary subjects. See also RP-24, Power Project Evaluations and Analyses.</p> <p><i>Retention Schedule: NI-305-07-1-2/d</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGF

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP-20-13	<p>Potential Hydroelectric Power</p> <p>Material pertaining to assessments performed to determine the feasibility of potential hydroelectric power plants.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGF
RP-20-14	<p>Efficiency Improvements</p> <p>Material pertaining to operating efficiencies (particularly hydro) that can be adopted to save use of energy.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGF
RP-20-15	<p>Options</p> <p>Material pertaining to the program of optioning power resources, whereby BPA would have the right-but not the obligation-to buy power resources within a specified time at a prearranged price.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTL
RP-21	<p>ST and LT Energy and Capacity Resources--Basic Data</p> <p>Data and information related to resource technologies, operating characteristics and research and development.</p> <p><i>Retention Schedule: NI-305-07-1-2/d</i> <i>Retain while Active + 19 years, and then destroy.</i></p>	PGP
RP-21-11	<p>Geothermal</p> <p>Geothermal Production and use of energy derived from geothermal resources, including regional database and summary of legal and institutional factors in various jurisdictions.</p> <p><i>Retention Schedule: NI-305-07-1-2/d</i> <i>Retain while Active + 12 years, and then destroy.</i></p>	PTL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP-21-12	<p>Thermal/Fossil</p> <p>Material relating to both thermal and fossil fueled generating resources.</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain while Active + 12 years, and then destroy.</i></p>	PTL
RP-21-13	<p>Solar</p> <p>Material relating to production and use of energy derived from the sun.</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain while Active + 12 years, and then destroy.</i></p>	PTL
RP-21-14	<p>Wind</p> <p>Generation of electricity by conversion of energy from wind, including regional database and summary of legal and institutional factors in various jurisdictions.</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain while Active + 12 years, and then destroy.</i></p>	PTL
RP-21-15	<p>Hydroelectric Modeling</p> <p>Material relating to the generation of electricity by conversion of the energy of running/flowing water. HOSS, HYDSIM, CV</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain while Active + 12 years, and then destroy.</i></p>	PGF,PGP
RP-21-16	<p>Biomass</p> <p>Material relating to organic matter that is available on a renewable basis including forest residues, agricultural crops and wastes, wood and wood wastes, animal wastes, livestock operation residue, aquatic plants and municipal waster.</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain while Active + 12 years, and then destroy.</i></p>	PTL
RP-21-17	<p>Congeneration</p> <p>Material relating to the simultaneous production of electricity and useful heat energy from the fuel source.</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain while Active + 12 years, and then destroy.</i></p>	PTL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP-21-19	<p>Hydroelectric-Secondary</p> <p>Material relating to production and marketing of secondary hydroelectric power.</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain while Active + 12 years, and then destroy.</i></p>	PGPO
RP-21-21	<p>Current and Future Resources</p> <p>Resources not listed above.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	PGP
RP-21-23	<p>Generation Equipment</p> <p>Technology issues and advances.</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain while Active + 12 years, and then destroy.</i></p>	PGF
RP-22	<p>Water Resources Basic Data</p> <p>See also RP-24, Power Project.</p> <p><i>Retention Schedule: N1-305-07-1-2/a</i> <i>Retain until superseded, then destroy</i></p>	PGP
RP-22-11	<p>Depletion</p> <p>Data relating to streamflow depletion due to irrigation, evaporation, drought and other conditions and situations.</p> <p><i>Retention Schedule: N1-305-07-1-2/a</i> <i>Retain until superseded, then destroy</i></p>	PGPW
RP-22-12	<p>Pumped Storage</p> <p>Data relating to pumped storage sites, including generation and pumping capability.</p> <p><i>Retention Schedule: N1-305-07-1-2/a</i> <i>Retain until superseded, then destroy</i></p>	PGP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP-22-13	<p>Floods and Flood Control</p> <p>Data relating to flood control requirements.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PGPO
RP-22-14	<p>Storage</p> <p>Data relating to site storage capabilities.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PGPO
RP-22-15	<p>Streamflow</p> <p>Data relating to historical modified streamflows, actual runoff experience and estimated long term flows.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/1</i> <i>Retain until superseded plus 22 years, and then destroy.</i></p>	PGPW
RP-22-16	<p>Headwater/Downstream Determinations</p> <p>Data relating to determinations of headwater benefits and payments.</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain while Active + 12 years, and then destroy.</i></p>	PGPL
RP-23	<p>Load and Resources Studies/Study Types</p> <p>General material about load studies.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PGPL
RP-23-12	<p>Cold Weather Event Studies</p> <p>Capacity studies and sales, total system and individual long term capacity development and analysis.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	PGPO

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP-23-14	<p>Load/REsource Balance</p> <p>Northwest loads and resources study, rate case studies and related documents. Includes BPA White Book.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	PGPL,PGPO
RP-23-14a	<p>Load/Resource Balance</p> <p>Northwest loads and resources study, rate case studies and related documents. Includes BPA White Book. (a) Published Studies</p> <p><i>Retention Schedule: N1-305-07-1-2/d</i> <i>Retain for 15 years and then destroy.</i></p>	PGPL,PGPO
RP-23-14b	<p>Load/Resource Balance</p> <p>(b) Supporting data.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain for 5 years and then destroy.</i></p>	PGPL,PGPO
RP-23-14c	<p>Load/Resource Balance -</p> <p>(c) Computer printouts.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain for 5 years and then destroy.</i></p>	PGPL,PGPO
RP-24-11	<p>Unsolicited Proposals</p> <p>Unsolicited Proposals Material on proposals for acquisition received by BPA outside any formal solicitation process.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	PGPO
RP-24-13	<p>Data Requests and Responses</p> <p>Data Requests and Responses Materials relative to external requests for information relative to BPA's activities (for example, rate case).</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	PGP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP-24a	<p>Power Projects</p> <p>FERC license applications and supporting material such as notices and maps of specific hydroelectric projects filed by the BPA with the FERC, includes methodology and models. Based on FERC III/I(C)(3).</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain for 20 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGF
RP-24b	<p>Power Projects</p> <p>Specific economic evaluations and analyses of potential power projects including the Washington Nuclear Power projects. Use tertiary subjects below.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/2</i> <i>Retain while Active + 20 years, and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGF
RP-26	<p>Utility/Customer Basic Data</p> <p>Historical data received from customers. Use tertiary subjects below.</p> <p><i>Retention Schedule: N1-305-07-1-2/a</i> <i>Retain until superseded, then destroy</i></p>	KSL
RP-26-11	<p>Utilities</p> <p>Statistical material relating to electricity usage. Utilities served by BPA are grouped according to whether they are publicly or privately owned and publics are further grouped according to whether they are generating or non-generating utilities. Financial and operating reports contain statistics by sector (residential, commercial, industrial and irrigation).</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain for 5 years and then destroy.</i></p>	KSL
RP-26-15	<p>Agricultural/Irrigation</p> <p>Statistical material relating to electricity used for irrigation. Includes customers who require electricity for such uses as pumping, spraying crops and stock pumps for pasturage.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain for 5 years and then destroy.</i></p>	KSL

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP-27	<p>Utilization Data</p> <p>Data on electrical consumption.</p> <p><i>Retention Schedule: N1-305-07-1-2/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	KSL
RP-27-11	<p>Domestic (Residential)</p> <p>Statistical material relating to electricity used by residential, farm, apartment and seasonal dwellings with such uses as space and water heating, cooking and lighting.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain for 5 years and then destroy.</i></p>	KSL
RP-27-12	<p>Commercial</p> <p>Statistical material relating to electricity generally used for trade and service activities. This sector has a variety of building types such as offices, schools, retail stores, warehouse, hotel and hospitals.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain for 5 years and then destroy.</i></p>	KSL
RP-27-15	<p>Diversity Factors</p> <p>Reports giving the ratio of the sum of the non-coincident maximum demands of the various subdivisions of a system, to the maximum coincidental demand of the whole system or part under consideration.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain for 3 years and then destroy.</i></p>	PGPL
RP-28-11	<p>Load Forecast Summary</p> <p>Includes plans and schedules.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain for 5 years and then destroy.</i></p>	KSL,PGPL

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RP-28-14a	<p>Industrial Load Forecast</p> <p>Material associated with current industrial sector loads-industrial output and employment (excluding direct service industries). (a) Published documents and forecasts.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-28-14b	<p>Industrial Load Forecast</p> <p>(b) Supporting documentation.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	KSL
RP-28-15a	<p>Irrigation Load Forecast</p> <p>Material on the total amount of irrigation sales of public and private utilities. (a) Published documents and forecasts.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-28-15b	<p>Irrigation Load Forecast</p> <p>(b) Supporting documentation.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	KSL
RP-28-16a	<p>Direct Service Industry Load Forecast</p> <p>Materials associated with current loads for Direct Service Industries (DSI). (a) Published documents and forecasts.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-28-16b	<p>Direct Service Industry Load Forecast</p> <p>(b) Supporting documentation.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	KSL

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RP-28-17a	<p>Miscellaneous Loads Forecast</p> <p>Forecast and analysis of load and related factors that are not classified elsewhere. (a) Published documents and forecasts.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-28-17b	<p>Miscellaneous Loads Forecast</p> <p>(b) Supporting documentation.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	KSL
RP-28a	<p>Load Forecasts</p> <p>(a) Published documents and forecasts.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL,PGPL
RP-28b	<p>Load Forecasts</p> <p>(b) Supporting documentation.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	KSL,PGPL
RP-29	<p>Economic Forecasts</p> <p>Economic Forecasts Supporting documentation for published forecasts.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-29-11	<p>Summary of Economic Forecasts</p> <p>Summary of Economic Forecasts Comparisons and examinations of employment and population in states and regions outside the Northwest.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain for 5 years and then destroy.</i></p>	KSL

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RP-29-12	<p>National Economics Forecast</p> <p>National Economics Forecast Material on examinations of national trends in employment and population gross national product over a 20-year planning horizon.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-29-13	<p>Regional Economics Forecast</p> <p>Regional Economics Forecast Materials on examinations of employment and population trends in the Northwest states over a 20-year planning horizon.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-29-14	<p>Demographics of Economic Forecast</p> <p>Demographics of Economic Forecast Material on examinations of trends in population, person per household and housing stock over a 20-year planning horizon.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-29-15	<p>Economic Forecast of Fuel Prices</p> <p>Economic Forecast of Fuel Prices Analysis of competitive market for fossil fuels in California markets.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-30	<p>Comparisons of Other Forecasts</p> <p>Comparisons to Other Forecasts Tables, graphs and briefing materials comparing current BPA forecasts with previous forecasts prepared by others.</p> <p><i>Retention Schedule: NI-305-07-1-2/d</i> <i>Retain for 11 years and then destroy.</i></p>	PGPL

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RP-30-11	<p>Northwest Power Planning Council Forecast</p> <p>Northwest Power Planning Council Forecast Material prepared by or for the Northwest Power Planning Council (NWPPC).</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	KSL,PGPL
RP-30-12	<p>Pacific Northwest Utilities Conference Committee Forecast</p> <p>Pacific Northwest Utilities Conference Committee Forecast Material prepared by or for the Pacific Northwest Utilities Conference Committee (PNUCC).</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	PGPL
RP-30-13	<p>Internal Forecast</p> <p>Internal Forecast Special forecasts prepared for internal use.</p> <p><i>Retention Schedule: NI-305-07-1-2/d</i> <i>Retain for 11 years and then destroy.</i></p>	PGPL
RP-32	<p>Conservation Issue Forecasts</p> <p>Conservation issue forecasts file with related material except as specified in the following tertiary subjects.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	KLH,KLJ,KLJC
RP-32-11	<p>Model Conservation Standards</p> <p>Building efficiency standards that have been adopted by the Northwest Power Planning Council (NWPPC).</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	KLH,KLJC
RP-32-12	<p>Program Savings Estimates</p> <p>Materials pertaining to the estimated energy savings associated with each conservation program.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	KLH,KLJC

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
RP-33	<p>Demand Side Management</p> <p>Demand Side Management Utility action designed to affect its loads either through marketing or through conservation and load management.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	KLH
RP-34-11a	<p>Direct Service Industries Short-term Forecasts</p> <p>Direct Service Industries Short-Term Forecasts Forecasts and related studies of BPA's direct service industrial customers used for revenue forecasting and rate filing system operations. (a) Published documents and forecasts. See also FI-27, Average System Cost, PM-14, Rate Analysis and EX-11-15, Publications.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-34-11b	<p>Direct Service Industries Short-Term Forecasts</p> <p>(b) Supporting documentation.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	KSL
RP-34-12a	<p>Generating Publics Short-term Forecasts</p> <p>Generating Publics Short-Term Forecasts Forecast and related studies of BPA's generating public customers used for revenue forecasting and rate filing system operations. (a) Published documents and forecasts. See also FI-27, Average System Cost, PM-14, Rate Analysis and EX-11-15, Publications.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-34-12b	<p>Generating Publics Short-Term Forecasts</p> <p>(b) Supporting documentation.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	KSL

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RP-34-13a	<p>Nongenerating Publics Short-term Forecasts</p> <p>Nongenerating Publics Short-term Forecasts Forecasts and related studies of BPA's nongenerating public customers used for revenue forecasting and rate filing system operations. (a) Published documents and forecasts. See also FI-27, Average System Cost, PM-14, Rate Analysis and EX-11-15, Publications.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	KSL
RP-34-13b	<p>Nongenerating Publics Short-Term Forecasts</p> <p>(b) Supporting documentation.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	KSL
RP-34-14a	<p>Coordination Agreement</p> <p>Coordination Agreement Forecast and related studies submitted under the Pacific Northwest Coordination Agreement and used to determine system operations. (a) Published documents and forecasts. See also FI-27, Average System Cost, PM-14, Rate Analysis and EX-11-15, Publications.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGPL,PGPO
RP-34-14b	<p>Coordination Agreement</p> <p>(b) Supporting documentation.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	PGPL,PGPO
RP-34a	<p>Short-term Forecasts and Analyses</p> <p>Short-term Forecasts and Analyses Five-year forecasts. Use tertiary subjects. (a) Published documents and forecasts. See also FI-27, Average System Cost, PM-14, Rate Analysis and EX-11-15, Publications. (b) Supporting documentation.</p> <p><i>Retention Schedule: NI-305-07-1-2/e/2</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PTF

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RP-34b	<p>Short-term Forecasts and Analyses -</p> <p>(b) Supporting documentation.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	PTF
RP-35	<p>Losses</p> <p>Losses Federal transmission, local transmission and distribution loss estimates and studies.</p> <p><i>Retention Schedule: NI-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	PGPL
RP-36	<p>Peak Loads</p> <p>Peak Loads Material relating to the maximum demand for power during a specified period.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	PGPL
RP-36-11	<p>Load Factors</p> <p>Load Factors Estimates of load factors to convert energy to peak estimates.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	PGPL
RP-36-12	<p>Diversity Factors</p> <p>Diversity Factors Estimates used to convert non-coincidental to coincidental peaks.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	PGPL
RP-36-13	<p>Load Shapes</p> <p>Load Shapes Projections of energy used by time of day and season of year.</p> <p><i>Retention Schedule: NI-305-07-1-2/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	PGPL

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RP-37	<p>Weather Adjustments</p> <p>Weather Adjustments Method of calculating for the affects of weather on energy usage.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	PGPW
RP-38a	<p>Sum of Utilities</p> <p>(a) Published documents and forecasts.</p> <p><i>Retention Schedule: N1-305-07-1-2/e/1</i> <i>Retain for 25 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	PGPL
RP-38b	<p>Sum of Utilities</p> <p>(b) Supporting doucmentation. See also EX-15-11, Publications.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	PGPL

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SS	<p>Support Services</p> <p>Material relating to support service functions, such as correspondence, forms, facilities (buildings), records, reports, mail services, reproduction and security management. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
SS-11	<p>Correspondence Management Program</p> <p>Material relating to BPA's Correspondence Management Program.</p> <p><i>Retention Schedule: N1-305-07-1-16/a</i> <i>Retain until superseded, then destroy</i></p>	A
SS-11-11	<p>Administrator's Chronological File</p> <p>A sharp, reproducible copy of every letter or memorandum signed, approved or concurred in by the Administrator or Deputy Administrator only.</p> <p><i>Retention Schedule: N1-305-07-1-5/d</i> <i>Retain for 20 years and then destroy.</i> <i>NARA Permanent: Offer in 5 year blocks when retention is met.</i></p>	A
SS-11-12	<p>Controlled Mail</p> <p>Correspondence from elected officials and other government agencies showing BPA-assigned tracking number.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 5 years and then destroy.</i></p>	A,DGC
SS-12	<p>Mail Services</p> <p>Material relating to certified, return registered and express mail. Based on GRS 12/5.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 3 years and then destroy.</i></p>	NWPP
SS-12-11	<p>Mailing/Distribution Lists</p> <p>Request forms and other material relating to changes in BPA's mailing and distribution lists.</p> <p><i>Retention Schedule: N1-305-07-1-23/a</i> <i>Retain until superseded, then destroy</i></p>	NWPP

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
SS-13a	<p>Forms Management</p> <p>Materials 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. (a) One record copy of each form created by BPA with related instructions and documentation showing inception, scope and purpose of the form.</p> <p><i>Retention Schedule:</i> <i>Retain until superseded plus 5 years, and then destroy.</i></p>	NJSI
SS-13b	<p>Forms Management</p> <p>Working papers, background materials, requisitions, specifications, processing data and control records.</p> <p><i>Retention Schedule:</i> <i>Retain until superseded, then destroy</i> <i>Destroy when related form is discontinued, superseded, or canceled.</i></p>	NJSI
SS-14	<p>Facilities Management</p> <p>Material relating to the operation and maintenance of BPA-occupied buildings. Includes non-electric plant maintenance issues such as roofing, painting and grounds care.</p> <p><i>Retention Schedule: NI-305-07-1-11/b</i> <i>Retain for 3 years and then destroy.</i></p>	NWF,NWM
SS-14-11	<p>Commuting and Parking</p> <p>Material relating to parking and public transportation. Parking materials include issues, statistics, carpool background information and problems. Public, transportation includes Tri-Met and C-Tran transit incentive applications.</p> <p><i>Retention Schedule: NI-305-07-1-15/b</i> <i>Retain for 1 years and then destroy.</i></p>	NWP
SS-14-12	<p>Agency Space Management</p> <p>Building plan files, surveys and other records utilized in agency space planning, assignment and adjustment.</p> <p><i>Retention Schedule: NI-305-07-1-15/b</i> <i>Retain for 2 years and then destroy.</i></p>	NWS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
SS-14-13	<p>Ergonomics</p> <p>Material relating to basic and symptomatic ergonomic assessments. Ergonomic program information, individual records of ergonomic assessment findings and recommendations.</p> <p><i>Retention Schedule: N1-305-07-1-14/c</i> <i>Retain for 7 years and then destroy.</i></p>	NWS
SS-15-11	<p>Paperwork Reduction Act</p> <p>Material relating to the Paperwork Reduction Act and the Information Collection Budget (ICB).</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 7 years and then destroy.</i></p>	DGC
SS-15-12	<p>Vital Records Program</p> <p>Material relating to those records essential to continue an organization's function during and after an emergency and records essential to protect the rights and interests of individuals and the government.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 3 years and then destroy.</i></p>	DGC
SS-15a	<p>Records Management - Descriptive Inventories</p> <p>Material relating to creation, maintenance, use and disposition of records. Includes inventory reports, records schedules, documents supporting transfers and requests for use of records materials. (a) Descriptive inventories, disposal authorizations, schedules, reports and studies.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 3 years and then destroy.</i></p>	DGC
SS-15b	<p>Records Management - Records Holding Reports</p> <p>(b) Records Holding Reports.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 3 years and then destroy.</i></p>	DGC

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SS-15c	<p>Records Management - Correspondence Files</p> <p>(c) Records Management Correspondence Files- files include correspondence, reports, authorizations and other records that relate to the management of agency records, including such matters as files management, the use of microforms, ADP systems, surveys and all other aspects of records management not covered elsewhere in this schedule.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 6 years and then destroy.</i></p>	DGC
SS-16	<p>Reproduction/Printing</p> <p>Material relating to the reproduction of records by any medium (such as duplication, photocopying and microfilming). Includes procedures about and responses to reproduction requests.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 3 years and then destroy.</i></p>	NWPP
SS-16-11	<p>Copier Management Program</p> <p>Material relating to convenience copiers, including analyses and rental information.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 3 years and then destroy.</i></p>	NJM
SS-16-12	<p>Joint Committee on Printing Reports</p> <p>Reports to Congress through the Joint Committee on Printing (JCP) and related records.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 3 years and then destroy.</i></p>	NWPP
SS-18	<p>Security</p> <p>Security material relating to the direction and coordinate of security plans, programs and procedures that are required for the protection of BPA's office space, facilities, materials, equipment and for BPA employees and visitors.</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain for 3 years and then destroy.</i></p>	NT

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SS-18-11a	<p>Physical Security</p> <p>Material relating to the protection of buildings, substations, vehicles, equipment, personnel and materials. (a) Security and Protective Services Administration. Material relating to administration and operation of the facilities security protective services programs and related contracting.</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain for 2 years and then destroy.</i></p>	NT
SS-18-11b	<p>Physical Security - Survey and Inspection Files</p> <p>(b) Survey and inspection files. Reports of physical security surveys and other Department 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 unauthorized entry, theft, vandalism, sabotage and to safeguard information of a classified or sensitive nature.</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain for 3 years and then destroy.</i></p>	NT
SS-18-11c	<p>Physical Security - Facility Data Sheets</p> <p>(c) Facility data sheets, including card key summaries, check sheets and Security Officer Reports (SORs).</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain for 1 years and then destroy.</i></p>	NT
SS-18-11d	<p>Physical Security - Central Guard Office Master Logs and Visitor Control Files</p> <p>(d) Central guard office master logs and visitor control files. Registers, logs and computer reports showing names of contractors, service personnel, visitors and employees admitted to areas. Also includes reports on vehicles and passengers.</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain for 2 years and then destroy.</i></p>	NT,TOZ
SS-18-11e	<p>Physical Security - Key Accountability Records</p> <p>(e) Files relating to accountability for keys issued.</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain while Active + 1 years, and then destroy.</i> <i>Active period ends upon return of key.</i></p>	NT,TOZ

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
SS-18-11f	<p>Physical Security - Security Alarm and Access Control System Files</p> <p>(f) Security alarm and access control system files and system manufacturers documentation which includes technical manuals for the equipment installed, matters relating to the security alarm system and the electronic access control system.</p> <p><i>Retention Schedule: N1-305-07-1-15/a</i> <i>Retain until superseded, then destroy</i></p>	NT,TESF
SS-18-11g	<p>Physical Security - Alarm System Activity Journals and Maintenance Records</p> <p>(g) Alarm system activity journals and maintenance records. Includes all of the user activity and alarm activity for all of the alarm and access control system. Files consist of system activity journals containing the on-site records for alarm system activity. Records that contain all activity concerning preventative and corrective maintenance performed on the alarm system and the sub-components. Files consist of maintenance requests, test reports, schedules and maintenance activity journals.</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain for 4 years and then destroy.</i></p>	NT
SS-18-12	<p>Personnel Security</p> <p>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 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.</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends upon separation or transfer of employee.</i></p>	NT,TOH
SS-18-13	<p>Computer Security</p> <p>Material relating to the physical protection of computer centers and computer hardware and software. See also IR-14, Automated Systems Security.</p> <p><i>Retention Schedule: N1-305-07-1-18/b</i> <i>Retain for 3 years and then destroy.</i></p>	NT,NJB

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
SS-18-14a	<p>Classified Handling Documents</p> <p>(a) Protection of documents that are considered vital to National security or sensitive to BPA operations. Includes forms accompanying documents to ensure continuing control, showing names of persons handling the documents, intro-office routing and comparable data. Also includes destruction certificates and classified inventory files/ledgers.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 3 years and then destroy.</i></p>	NT
SS-18-14b	<p>Classified Document Inventory Files</p> <p>(b) Classified document inventory files forms, ledgers or registers used to show identity, internal routing and final disposition made of classified documents, but exclusive of classified document receipts and destruction certificates and documents relating to Top Secret material covered elsewhere in this schedule.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 3 years and then destroy.</i></p>	NT
SS-18-15a	<p>Reports of Vandalism, Theft and Other Criminal and Non Criminal Activity</p> <p>This category consists of reports concerning vandalism, theft or other criminal activity involving BPA assets, facilities employees or contractors meeting DOE Incident Measurement Index criteria at any level. This category may also contain non criminal security incident reports involving employee security violations, circumvention of security and other non criminal activity requiring Security and Emergency Response Office attention.</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon termination of inquiry/investigation when the case is closed.</i></p>	NT

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SS-18-15b	<p>Official Inquiries/Investigations - Incidents of a Security Concern</p> <p>This category consists of Incidents of Security Concern prompting an Official Inquiry/Investigation and meeting DOE Incident Measurement Index 1, and involving classified information or material. This category may also contain serious security incidents not pertaining to criminal activity such as altering security systems, suspected sabotage of security systems, unauthorized voice recording and other incidents of a potentially serious nature.</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active period ends up termination of inquiry/investigation when the case is closed.</i></p>	NT
SS-18-15c	<p>Suspicious Activity Reports</p> <p>Suspicious Activity Reports involving potential, suspected or confirmed surveillance or other potential terrorist planning activity or other activity indicating individual(s) watching or surveilling and meeting DOE Incident Measurement Index level 1 or 2.</p> <p><i>Retention Schedule: N1-305-07-1-15/c</i> <i>Retain while Active + 10 years, and then destroy.</i> <i>Active period ends upon sale or decommissioning of the facility or closure of the case, whichever is longer.</i></p>	NT
SS-18-18	<p>Emergency Management & Preparedness</p> <p>Material relating to programs and activities associated with the training and preparedness of BPA personnel for disaster management and disaster recovery. Includes plans for response to such conditions and situations as fire, serious medical emergencies, earthquake, bombs and terrorism. Includes preparation of Continuity of Operations Plans. Includes documentation of BPA's preparation for and executive of practice disaster exercises, such as QuakEx, that test emergency procedures. Also includes material related to the administration of BPA's Emergency Evacuation Warden Program including exercises and training, First Responders and Light Urban Search and Rescue Team.</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain until superseded plus 3 years, and then destroy.</i></p>	DB,DBR,NT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
SS-18-19	<p>Workgroup Specific Continuity of Operations Plans</p> <p>Plans and supporting documentation on how to continue operations in a state of emergency.</p> <p><i>Retention Schedule: N1-305-07-1-16/a</i> <i>Retain until superseded, then destroy</i></p>	Z
SS-18-20a	<p>Classified Document Container Security Files - Combinations</p> <p>(a) Forms or lists used to record safe and padlock combinations, names of individuals knowing combinations and comparable data used to control access into classified document containers.</p> <p><i>Retention Schedule: N1-305-07-1-16/a</i> <i>Retain until superseded, then destroy</i></p>	NT
SS-18-20b	<p>Classified Document Container Security Files - Safe Activity</p> <p>(b) Forms placed in safes, cabinets or vaults containing security classified documents that record opening, closing and routine checking of the security of the container, such as locking doors and windows and activating alarms. Included are such forms as SF 701, Activity Security Checklist and SF 702, Security Container Check Sheet.</p> <p><i>Retention Schedule: N1-305-07-1-16/b</i> <i>Retain for 3 years and then destroy.</i></p>	NT
SS-18-21a	<p>Operations Security Policies</p> <p>OPSEC policies, manuals and documents used as guides in administering BPA's OPSEC Program. Includes DOE action and information papers concerning OPSEC policy.</p> <p><i>Retention Schedule: N1-305-07-1-5/c</i> <i>Retain until superseded plus 10 years, and then destroy.</i> <i>Cut off when superseded. Transfer to NARA 25 years after cutoff.</i></p>	NT
SS-18-21b	<p>Operations Security Management</p> <p>(b) Records relative to management and/or operation of agency and contractor OPSEC Programs including correspondence, plans, meeting minutes, audits, OPSEC WG rosters and Charters and other similar records.</p> <p><i>Retention Schedule: N1-305-07-1-15/b</i> <i>Retain for 6 years and then destroy.</i></p>	NT

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SS-18-22a	<p>Technical Surveillance Countermeasures Files - Threats</p> <p>(a) Threat files and reports of known or suspected technical and nontechnical security information, methodology, technologies used, suspected individual(s) or groups, reports of actions directed against US Government and commercial interest and/or personnel.</p> <p><i>Retention Schedule: N1-305-07-1-15/a</i> <i>Retain until superseded, then destroy</i></p>	NT
SS-18-22b	<p>Technical Surveillance Countermeasures Files - Hazards and Penetrations</p> <p>(b) Hazard and penetration files and material that provides general and specific design information on known or suspected surveillance devices, electronic anomalies, methodology and historical technical data.</p> <p><i>Retention Schedule: N1-305-07-1-15/a</i> <i>Retain while Active + 0 years, and then destroy.</i></p>	NT
SS-19	<p>General Shops Service Request</p> <p>BPA Form 6400.03, General Shops Service Request and supporting documents; BPA Form 4250.11, Purchase Request/Receiving Report; BPA Form 1540.01, Transportation Services Request, that reflect activity in BPA's General Shops. Includes functions such as painting, welding, sheet metal, machine, carpentry and plumbing.</p> <p><i>Retention Schedule: N1-305-07-1-11/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends upon completion of service request.</i></p>	TFHG
SS-20	<p>Interagency Support</p> <p>Materials related to interagency support. Including, but not limited to, contracts, Memorandums of Agreements, audits, inventory and other support documentation.</p> <p><i>Retention Schedule:</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon termination of contract or agreement.</i></p>	NT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
SU	<p>Supply Services</p> <p>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. All records in this chapter are scheduled in media neutral format</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
SU-12	<p>Procurement Actions</p> <p>See SU-12a,b,c,d.</p> <p><i>Retention Schedule: N1-305-07-1-9/a</i> <i>Retain for 0 years and then destroy.</i></p>	
SU-12-11a	<p>Solicitations - Unsuccessful Proposals</p> <p>Solicitation files maintained by operational contracting offices consisting of drafts, addendums, mailing lists, offeror's data, abstracts and related correspondence.</p> <p><i>Retention Schedule: GRS-3/3</i> <i>Retain while Active + 0.25 years, and then destroy.</i> <i>Active period ends upon award of another successful offer. Litigation Hold 11/2007. (Note: corrected date from 4/2008 per correspondence from General Counsel.)</i></p>	NSP,NSSM,NSSP, NSSC,NSSV,NSTS
SU-12-11b	<p>Solicitations - Canceled Solicitations</p> <p>Formal solicitations to provide goods or services which were canceled prior to award. Unopened bids are returned to bidder.</p> <p><i>Retention Schedule: GRS-3/3</i> <i>Retain for 0.25 years and then destroy.</i> <i>Litigation Hold 11/2007. (Note: corrected date from 4/2008 per correspondence from General Counsel.)</i></p>	NSP,NSSM,NSSP, NSSC,NSSV,NSTS
SU-12-11c	<p>Solicitations - Unsolicited Proposals</p> <p>(c) Unsolicited proposals.</p> <p><i>Retention Schedule: GRS-3/3</i> <i>Retain for 0.25 years and then destroy.</i> <i>Litigation Hold 11/2007. (Note: corrected date from 4/2008 per correspondence from General Counsel.)</i></p>	NSP,NSSM,NSSP, NSSC,NSSV,NSTS

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
SU-12a	<p>All Purchases/Contracts - Commercial Under \$100,000</p> <p>Contracting documents with original signatures. Contract and contract modifications, requisition and requisition changes, purchase order and purchase order revisions, lease and bond and surety records, including correspondence and related papers pertaining to award, administration, receipt, inspection, acceptance, payment and warranty, internal reviews and approvals, waivers, ratifications, and protests of procurement actions. See also FI-17, Expenditure Documentation.</p> <p><i>Retention Schedule: GRS-3/3</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon termination of contract or expiration of warranty.</i> <i>Litigation hold: 11/2007 (Note: corrected date from 4/2008 per correspondence from General Counsel.)</i></p>	<p>DGP,NSP,NSSC, NSSM,NSSP, NSSV,NST,NSTS, TER,TFH</p>
SU-12b	<p>All Purchases/Contracts - Commercial Over \$100,000</p> <p>Contracting documents with original signatures. Contract and contract modifications, requisition and requisition changes, purchase order and purchase order revisions, lease and bond and surety records, including correspondence and related papers pertaining to award, administration, receipt, inspection, acceptance, payment and warranty, internal reviews and approvals, waivers, ratifications, and protests of procurement actions. See also FI-17, Expenditure Documentation.</p> <p><i>Retention Schedule: GRS-3/3</i> <i>Retain while Active + 6 years, and then destroy.</i> <i>Active period ends upon termination of contract or expiration of warranty.</i> <i>Litigation Hold 11/2007 (Note: corrected date from 4/2008 per correspondence from General Counsel.)</i></p>	<p>DGP,NSP,NSSC, NSSM,NSSP, NSSV,NST,NSTS</p>
SU-12c	<p>Routine Procurements-Non-commercial - Under \$100,000</p> <p>(c) Non-commercial - under \$100,000 DO NOT USE. AS OF MARCH 24, 2008, RECORDS IN SU-12(A)</p> <p><i>Retention Schedule: GRS-3/3</i> <i>Retain while Active + 6 years, and then destroy.</i> <i>Litigation Hold 11/2007. (Note: corrected date from 4/2008 per correspondence from General Counsel.)</i></p>	<p>NSP,NSSC,NSSM, NSSP,NSSV, NST,NSTS</p>

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
SU-12d	<p>Routine Procurements-Non-commercial - Over \$100,000</p> <p>(d) Non-commercial - over \$100,000 DO NOT USE. AS OF MARCH 24, 2008, RECORDS IN SU-12(B)</p> <p><i>Retention Schedule: GRS-3/3</i> <i>Retain while Active + 6 years, and then destroy.</i> <i>Litigation Hold 11/2007. (Note: corrected date from 4/2008 per correspondence from General Counsel.)</i></p>	<p>NSP,NSSC,NSSM, NSSP,NSSV, NST,NSTS</p>
SU-13	<p>Socio-Economic Programs</p> <p>Material relating to small, minority and woman-owned businesses.</p> <p><i>Retention Schedule: N1-305-07-1-9/c</i> <i>Retain for 7 years and then destroy.</i></p>	NSS
SU-14	<p>Materials Management</p> <p>Material relating to inventory management, material storage and disposal, tools and work equipment and property management policies. See also FI-13, Property Accounting.</p> <p><i>Retention Schedule: N1-305-07-1-10/b</i> <i>Retain while Active + 1 years, and then destroy.</i></p>	<p>NWF,TFC,TFD, TFE,TFI,TFK, TFKB,TFKC, TFKD,TFKE,TFK F,TFKI,TFKJ, TFKV,TFKZ,TFL, TFN,TFO,TFP, TFR,TFS,TFV, TFW,TOH</p>
SU-14-11a	<p>Inventory Management - System Equipment Records</p> <p>Material relating to BPA stock and non-stock items as well as System Equipment Records (SER).</p> <p><i>Retention Schedule: N1-305-07-1-10/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	<p>TFC,TFD,TFK, TFKB,TFKC, TFKD,TFKE, TFKF,TFKI,TFKJ, TFKV,TFKZ,TFN, TFO,TFP,TFR, TFS,TFV,TFW</p>
SU-14-11b	<p>Inventory Management - Material Requests</p> <p>Material requests.</p> <p><i>Retention Schedule: N1-305-07-1-10/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	Z

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SU-14-11c	<p>Inventory Management - Equipment Loans</p> <p>Equipment loans.</p> <p><i>Retention Schedule: N1-305-07-1-10/b</i> <i>Retain while Active + 2 years, and then destroy.</i></p>	<p>NSLU,TFC,TFD, TFI,TFK,TFKB, TFKC,TFKD, TFKE,TFKF, TFKI,TFKJ,TFKV, TFKZ,TFN,TFO, TFP,TFR,TFS, TFV,TFW</p>
SU-14-13a	<p>Tools and Work Equipment Requests</p> <p>(a) Tools and Work Equipment Requests.</p> <p><i>Retention Schedule: N1-305-07-1-10/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	<p>NSSM,NSSP,NSSC, NSSV,NSTS,TFC, TFD,TFE,TFH, TFK,TFKB, TFKC,TFKD, TFKE,TFKF,TFKI, TFKJ,TFKV, TFKZ,TFL,TFN, TFO,TFP,TFR, TFS,TFV,TFW</p>
SU-14-13c	<p>Ross Stock Catalog</p> <p>(c) Ross Stock Catalog.</p> <p><i>Retention Schedule: N1-305-07-1-10/a</i> <i>Retain until superseded, then destroy</i></p>	<p>NSSM,NSSP,NSSC, NSSV,NSTS</p>
SU-14-15	<p>Material Disposal</p> <p>Materials relating to the disposal of all excess material and equipment at BPA. Includes property disposal through DOE, GSA, sale (Standard Form 114e, Sale of Government Property Negotiated Sales Contract, and Standard Form 122e, Transfer Order for Excess Personal Property), term contract and donation (Standard Form 123). See also FI-13, Property Accounting.</p> <p><i>Retention Schedule: N1-305-07-1-10/b</i> <i>Retain while Active + 6 years, and then destroy.</i></p>	NSLU
SU-15	<p>Quality Assurance</p> <p>Material relating to BPA's Quality Assurance Program, program guide and related regulatory requirements.</p> <p><i>Retention Schedule: N1-305-07-1-11/e/1</i> <i>Retain while Active + 25 years, and then destroy.</i></p>	TELS

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SU-15-12	<p>BPA Specifications</p> <p>Master copies maintained and filed by originating office.</p> <p><i>Retention Schedule: N1-305-07-1-11/e/1</i> <i>Retain while Active + 25 years, and then destroy.</i></p>	<p>TELC,TELS, TESF,TET,TETC, TETD</p>
SU-15-13	<p>Factory Surveillance Activities</p> <p>Reports relating to factory inspection, test and evaluation maintained by office originating related BPA specification. Contract specific data included in contract file.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	<p>TEL,TELC,TELD, TELS,TESF,TET, TETC,TETD</p>
SU-15-14	<p>Vendor QA Surveillance Plans and QA Program Manuals</p> <p>Plans detailing quality assurance surveillance activities maintained by office originating plan and related BPA specification. Contract specific data included in contract file.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	<p>TEL,TELC,TELS, TESF,TET,TETC, TETD</p>
SU-15-15	<p>Quality Assurance Program Guide and Service Contracts</p> <p>Details descriptions of quality assurance program.</p> <p><i>Retention Schedule: N1-305-07-1-11/e/1</i> <i>Retain while Active + 25 years, and then destroy.</i></p>	<p>TELS</p>
SU-15-16	<p>Construction Quality Control Inspection Reports</p> <p>Construction inspection records maintained with official contract file.</p> <p><i>Retention Schedule: N1-305-07-1-11/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	<p>NSLU,TELD,TELF, TELS,TESF</p>
SU-15-17	<p>Supplier Evaluation, Qualification and Certification List</p> <p>Reports detailing technical and contracting evaluations of prospective and current active vendors.</p> <p><i>Retention Schedule: N1-305-07-1-9/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	<p>TELS</p>

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SU-16	<p>Supplies and Equipment</p> <p>Material relating to requests for supplies and equipment. See also FI-13, Property Accounting.</p> <p><i>Retention Schedule: GRS-3/4</i> <i>Retain for 2 years and then destroy.</i></p>	NWP
SU-16-11	<p>Personal Property Requisitions and Inventories</p> <p>Material relating to inventories of office equipment, including numbered office equipment.</p> <p><i>Retention Schedule: N1-305-07-1-10/b</i> <i>Retain until superseded plus 1 years, and then destroy.</i></p>	NWF
SU-16-12	<p>Receiving Reports</p> <p>Material relating to the receipt of equipment.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain for 3 years and then destroy.</i></p>	NSLT
SU-16-13	<p>Maintenance and Repair</p> <p>Material relating to the maintenance and repair of BPA-owned or leased office and substation equipment. See also SU-14-11, Inventory Management.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon sale or decommissioning of equipment.</i></p>	TF, TFC, TFD, TFE, TFH, TFK, TFL, TFM, TFN, TFO, TFP, TFR, TFS, TFV, TFW
SU-16-15	<p>Non-Stock Office Supply System</p> <p>BPA F4250.02e, contract office supplies and BPA F 4250.01, non-contract office supplies. Used to requisition miscellaneous supplies not included in SU-16. Does not include furniture or equipment.</p> <p><i>Retention Schedule: GRS-3/3(a)(2)</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active period ends upon final payment.</i></p>	NWP

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TM	<p>Transmission Marketing</p> <p>Material relating to rate determination, revenue requirements and to customer services such as contract development and administration for transmission acquisition, sales, exchange, transmission and billing. FERC refers to Federal Energy Regulatory Commission. All records in this chapter are scheduled in media neutral format.</p> <p><i>Retention Schedule: N1-305-07-1</i></p>	
TM-11	<p>Transmission Customer Relations</p> <p>Transmission contracting material for specific customers. Correspondence and other specific, customer non contract-related material.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TS,TSE,TSES
TM-12	<p>Transmission Contract Transactions</p> <p>Material relating to the type of transmission contract transactions including interconnection agreements, control area agreements and all developmental material. Work folders consisting of material relating to the type of transmission contract transactions, which may include correspondence and other material establishing BPA's Transmission policies and procedures governing transmission contract development.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	TSES
TM-12-11	<p>Contract Support Material</p> <p>Material related to transmission contract formulation, such as working files, worksheets, calculations, etc.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	TSES

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TM-12-12	<p>Contract Management, Development, Negotiation and Contract Administration</p> <p>Material regarding all transmission related contract development (contract template forms), administration, business practices and policies including protocol and guidelines (as they relate to Transmission Contracts) and support activities.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	KSC,TSES
TM-12-13	<p>Transmission Contracts - Original Signed Contract</p> <p>Contracts for all types of transmission, products and services. See also ES-09-05 (CCIS) for Master Authenticated Contracts.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when contract is terminated.</i></p>	KSC,TSES
TM-12-14	<p>Terminated and/or Dropped Contracts</p> <p>Contracts for all types of terminated and/or dropped contracts, terminated either by the vendor or BPA.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when contract is terminated.</i></p>	KSC,TSES
TM-13	<p>Fiber Optics (Contracts)</p> <p>Fiber optics contracts (including license agreement) depict fiber optic network route agreements with various outside telecom carriers for dark fiber and other rights-of-way sources.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when contract is terminated.</i></p>	KSC,TSES

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
TM-14	<p>Personal Communications Systems (Contracts)</p> <p>Wireless and Personal Communications Systems (PCS) agreements (including License Agreement) which describe personal communications systems that are frequency driven by facilities such as BPAs high microwave towers and transmission line structures that give signals that required range. Handsets can combine paper, fax, telephone and data communications and may plug directly into the computers.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when contract is terminated.</i></p>	KSC,TSE,TSES
TM-15	<p>Open Access Service Agreements</p> <p>Open Access Same Time Information System Agreements that incorporate an information network developed by the electric industry in response to FERC policy on transmission access, is intended to provide information and processes necessary for non-discriminatory access to electric transmission systems.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends when contract is terminated.</i></p>	KSC,TSES
TM-16	<p>Contracts/Operations and Maintenance Agreements Relating to Construction of Transmission Lines and/or Substations</p> <p>Material relating to the contract portion of the construction of transmission lines and/or substations, including operations and maintenance agreements.</p> <p><i>Retention Schedule: N1-305-07-1-11/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	KSC,TSES
TM-18	<p>Transmission Billing (Do Not Use/See PM-11-19 and PM-11-20)</p> <p>BPA's Transmission customer bills, billing source data, metering data, related notes and correspondence. See also FI-23, Revenue and Receipts for accounts receivable copy of bill and accounting data. See also PM-11-17, Billing Source Data.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i> <i>BPA's Power and Transmission Customer bill and billing backups will filed in PM-11-19 and PM-11-20 5/1/2010. Do Not Delete this file code until all associated records in ERMS or Records Storage have been destroyed.</i> VITAL RECORD</p>	KSB

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TM-18-11	<p>BPA Metering Support Documentation (Do Not Use/See PM-11-19 and PM-11-20)</p> <p>Material obtained by BPA to support anomaly research for usage data. Documentation includes, but not limited to, meter maintenance and outage reports, meter installation and change records, meter slips and outage and load shift reports.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i> <i>Active period ends when contract is terminated. BPA's Power and Transmission Customer bill and Billing backups will be filed in PM-11-19 and PM-11-20. Do Not Delete this file code until all associated records in ERMS or Records Storage have been destroyed.</i> VITAL RECORD</p>	KSB
TM-18-12	<p>Transmission Billing Back-up (Do Not Use/See PM-11-19 and PM-11-20)</p> <p>Copies of BPA's Transmission customers' bills and all supporting documentation.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i> <i>BPA's Power and Transmission Customer bill and Billing Backups will be filed in PM-11-19 and PM-11-20 5/1/2010. Do Not Delete this file code until all associated records in ERMS or Records Storage have been destroyed.</i> VITAL RECORD</p>	KSB
TM-19	<p>Transmission Revenue Forecasting</p> <p>Involves (1) forecasting sales and revenue from TBL general transmission rates (2) producing reports covering a comprehensive accounting of TBL revenue from all resources for TBL management and official BPA reporting and (3) developing general transmission rates and documenting the calculations in the TBL's Transmission Rates model. Also included are models developed to forecast long-term transmission costs and sales in order to forecast transmission rates.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 10 years, and then destroy.</i> <i>Destroy 5 years after adopted or effective or 10 years from date of analysis, whichever is sooner.</i></p>	TSPQ

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
TM-20	<p>Transmission Revenue Analysis</p> <p>Prepares monthly revenue report and performs in-depth analyses related to the accounting and reporting of TBL transmission revenues. Reviews monthly revenue report to determine whether revenues are properly booked and accounted for in the Revenue Information System (RIS). Compares monthly results of operations to the forecast and performs variance analyses of revenues. Prepares a variety of spreadsheets and reports in MS Excel and Access.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 10 years, and then destroy.</i> <i>Destroy 5 years after adopted or effective or 10 years from date of analysis, whichever is sooner</i></p>	TSPQ
TM-21	<p>Transmission Risk Management</p> <p>Materials relating to all aspects of Risk Management as it relates to BPA's Transmission Business Line. Includes assessments of risk exposure, effects of transmission policies and practices on risk exposures, commercial insurance policies purchased by BPA for transmission business, participation in certain self-insured and insurance pools, including brown/black-out insurance. This also includes material related to amounts recovered from insurance policies due to losses and other claims by BPA and financing of both property and liability loss exposures. This may also include all other materials related to transmission risk avoidance, risk protection, risk mitigation and financing. The TBL Risk Manager serves as the process manager for Risk Management within the Transmission Business Line.</p> <p><i>Retention Schedule: N1-305-07-1-14/a</i> <i>Retain until superseded, then destroy</i></p>	TSE, TSPP
TM-22	<p>Transmission Rate Case</p> <p>Material related to Transmission determinations, revenue requirements, and related matters before the Federal Energy Regulatory Commission (FERC), including preliminary (pre-initial), initial, supplemental and final rate proceedings. Also included are materials on rate case discussions and/or communications with customers/parties with proper notice, before initial proposal in the 7(1) process. See also FI-28, Revenue Requirements and FI-29 Repayment.</p> <p><i>Retention Schedule: N1-305-07-1-3/d</i> <i>Retain while Active + 50 years, and then destroy.</i></p>	TSPQ

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
TM-23	<p>Transmission Load Forecasting</p> <p>Information developed internal to the TBL for planning and revenue purposes for 120 of our customers. A customer's forecast consists of monthly historical and forecast data for the following four types of units: Energy (MWh), Non-Coincidental (MW), Coincidental (MW), and TTSL (MW) demands by each customer and by point of delivery for 10 years.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 10 years and then destroy.</i></p>	KSL
TM-24	<p>Open Access Same Time Information System (OASIS) Administration</p> <p>FERC required OASIS web-based postings that provide information at the same time to all customers regarding the transmission system and its availability, including long and short-term reservation requests for transmission, personnel transfers between business lines, standards of conduct (SOC) issues, tariff deviations, emergency situations which may impact SOC, list of system studies, OASIS host information, and OASIS access security information.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 5 years and then destroy.</i> VITAL RECORD</p>	TSRM,TSRS
TM-25	<p>External Organizational Response Data</p> <p>Documentation gathered with the purpose of supporting responses to inquiries from sources that include, but are not limited to, Western Electric Coordinating Council (WECC), Federal Energy Regulatory Commission (FERC), North American Electric Reliability Corporation (NERC) and Northwest Power Pool (NWPP). Such documentation may include raw data, statistics and reports compiled as a measurement of BPA Transmission's or BPA's Power performance against Reliability Management System requirements and other documentation deemed necessary to support a response.</p> <p><i>Retention Schedule: N1-305-07-1-5/b</i> <i>Retain for 4 years and then destroy.</i></p>	PT,PTK,PTL TSS
TM-26	<p>Real-Time Transmission Scheduling</p> <p>All documentation directly pertaining to the verification and delivery process of transmission products scheduling.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 7 years, and then destroy.</i></p>	TSS

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TM-27	<p>Transmission Pre-Scheduling</p> <p>All documents directly pertaining to the Northwest (NW) and Southwest (SW) transmission pre-scheduling function including, but not limited to, electronic tags, faxed data and e-mail from customers. Also covers Power Services activities for all of the above.</p> <p><i>Retention Schedule: N1-305-07-1-3/c</i> <i>Retain while Active + 10 years, and then destroy.</i></p>	PTK,TSS
TM-29	<p>Capacity Allocations</p> <p>Documentation of Transmission Contract Holder (TCH) capacity allocations by constrained path, showing daily TCH curtailments and resulting allocation per month per year.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 7 years, and then destroy.</i> VITAL RECORD</p>	TSST
TM-31	<p>After-the-Fact (ATF)</p> <p>Documentation relative to requests and establishment of specific accounts for the purpose of tracking commercial transmission transactions and resolution and settlement of ATF control area and customer accounting issues including, but not limited to, update of historical accounts reports and supporting documentation such as correspondence with customers or screen shots.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active period ends 90 days following the end of the scheduled month.</i></p>	TSST
TM-33	<p>Customer Service</p> <p>Long-Term Transmission Service Support (ATC) Transmission Supply documentation on specific customer issues. Documentation of customer issues including, but not limited to, authorizations for offers, determinations and ATC analysis associated with long-term firm transmission service requests.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	TSRM

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TM-34	<p>Short-Term & Hourly Transmission Service Support Contract Management</p> <p>Documentation of customer issues including, but not limited to, related reservation management and requests for extended end-time of short-term market processing.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i> VITAL RECORD</p>	TSRM
TM-35	<p>Load and Resource Forecasts</p> <p>Forecasts of loads and resources used for Available Transfer Capability (ATC) calculations and load/resource balance within the BPA control area. This includes correspondence and policies related to these forecasts and their implementation.</p> <p><i>Retention Schedule: N1-305-07-1-4/d</i> <i>Retain for 15 years and then destroy.</i></p>	KSL
TM-36	<p>Capacity Coordination</p> <p>Documentation of the capacity on constrained paths including California/Oregon Intertie (COI), Pacific Direct Current Intertie (PDCI), Northern Intertie (NI), Montana Power Company (MPC), West of Hawaii (WOH), LaGrande and Reno-Alturas.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 5 years and then destroy.</i></p>	TOD
TM-37	<p>Outages and Path Capacity</p> <p>Documentation related to the capacity on constrained paths.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain for 5 years and then destroy.</i></p>	TOD,TOT
TM-38	<p>Voice Recordings of Transmission Supply Reservations, Pre-Schedule and Real-time</p> <p>Voice recordings of Transmission Supply main functions, including reservations, pre-schedule, real-time and After-the-Fact business transactions and issue resolution with customers.</p> <p><i>Retention Schedule: N1-305-07-1-2/c</i> <i>Retain for 7 years and then destroy.</i></p>	TOH

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TM-39	<p>Rotary Account Support</p> <p>Material utilized to identify and document rotary account changes and deletions. Documentation includes, but is not limited to, snap shots of RODS accounts prior to the execution of changes or deletions, e-mails, notices and call logs.</p> <p><i>Retention Schedule: N1-305-07-1-2/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TSRS
TM-40a	<p>Business Practices</p> <p>Transmission business practices are policy and guidelines for the purpose of clarifying the implementation provisions of BPA's Open Access Transmission Tariff (OATT), the Transmission and Ancillary Service Rate Schedules (Rate Schedules), ATC Methodology and orders of the Federal Energy Regulatory Commission (FERC) or to establish Transmission Marketing and Sales policy as required in the course of business.</p> <p><i>Retention Schedule: N1-305-07-1-2/e-1</i> <i>Retain for 36 years and then destroy.</i></p>	TSPP, TSPQ
TM-40b	<p>External Guidance Records</p> <p>Records including, but not limited to, procedures, bulletins, policy or guidelines posted or issued for the purpose of communicating instructions for customer/external entities to assist with the execution of a task or set of tasks to accomplish or facilitate daily operations and interaction with the Transmission Marketing and Sales organizations.</p> <p><i>Retention Schedule: N1-305-07-1-17/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TSPP, TSPQ TSRS
TM-40c	<p>Internal Guidance Records</p> <p>Records including, but not limited to, decision documents, bulletins, Change Management documentation, procedures, policy or guidelines posted or issued for the purpose of communicating instructions for internal organizations to follow in the execution of a task or set of tasks to accomplish or facilitate daily operations. Procedure documentation supports NERC and A-123 agency compliance.</p> <p><i>Retention Schedule: N1-305-07-1-4/c</i> <i>Retain while Active + 7 years, and then destroy.</i> <i>Active means until superseded.</i></p>	TSE, TSPP TSPQ, TSRS, TSS

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Last Revision Date: May 18, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
TM-40d	<p>External Notices</p> <p>Notice posted or issued with the purpose of communication and compliance with industry standards for communications of events including, but not limited to, FERC and Tariff filings, customer meeting notification, process and policy changes, time change, implementation dates, deadlines, etc. that concern or impact customers, stakeholders, external entities, etc. Documentation supports FERC audit and other regulatory compliance requirements.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 5 years, and then destroy.</i> <i>Active means until specified occurrence is past.</i></p>	TSPP,TSPQ TSRS,TSS
TM-40e	<p>Internal Notices</p> <p>Notice posted or issued with the purpose of communicating upcoming events, including but not limited to time change, implementation dates, deadlines, etc., that concern or impact internal organizations.</p> <p><i>Retention Schedule: N1-305-07-1-4/b</i> <i>Retain while Active + 3 years, and then destroy.</i> <i>Active means until specified occurrence is past.</i></p>	TSPP,TSPQ TSRS,TSS

810 FILE GUIDE AND RETENTION SCHEDULE: TRAVEL AND TRANSPORTATION

Last Revision Date: March 18, 2010

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
TT	<p>Travel And Transportation</p> <p>Material relating to general travel and transportation documentation. Includes correspondence, reports and similar general records about the movement of goods and persons under Federal Property Management Regulations and reimbursement of employees for travel expenses under the Federal Travel Regulations. All records in this chapter are scheduled inmedia neutral format.</p> <p><i>Retention Schedule: NI-305-07-1</i> <i>Retain for 2 years and then destroy.</i></p>	FTD
TT-11	<p>Employee Travel</p> <p>Material relating to reimbursing individuals for official travel. Includes travel authorizations, travel vouchers, transportation requests and supporting documentation such as receipts.</p> <p><i>Retention Schedule: GRS-9/3(a)</i> <i>Retain for 6 years and then destroy.</i></p>	Z
TT-11-11	<p>Official Passports</p> <p>Material relating to issuance of official passports.</p> <p><i>Retention Schedule: GRS-9/5(a)</i> <i>Retain for 3 years and then destroy.</i></p>	FTD
TT-12	<p>Transportation-Passengers and Freight</p> <p>Material relating to freight consisting of export certificates, transit certificates, demurrage card record books, shipping documents pertinent to freight classification, memorandum copies of Government or commercial bills of lading, shortage and demurrage reports and supporting documents. Also includes Government Transportation Requests [GTRs] for common carrier transportation services.</p> <p><i>Retention Schedule: GRS-9/1(a)&(c)</i> <i>Retain for 6 years and then destroy.</i></p>	FTD
TT-12-11	<p>Freight Bills</p> <p>Bills of Lading for common carrier transportation, shipment of household goods and transportation of goods.</p> <p><i>Retention Schedule: GRS-9/1(a)&(c)</i> <i>Retain for 6 years and then destroy.</i></p>	FTD

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
TT-12-12	<p>Passenger Bills</p> <p>Material relating to payment of Government Transportation Requests [GTRs].</p> <p><i>Retention Schedule: GRS-9/1(a)&(c)</i> <i>Retain for 6 years and then destroy.</i></p>	FTD
TT-12-13	<p>BPA Rail Cars, Carrier Files, Hazardous Material</p> <p>All material relating to BPA-owned rail cars including drawings and regulations pertaining to shipments of hazardous material. See also EQ-18, Hazardous Waste Management Program.</p> <p><i>Retention Schedule: NI-305-07-1-11/a</i> <i>Retain until superseded, then destroy</i></p>	NSLT
TT-12-14	<p>BPA Substation and Storage Yard Shipping Destinations</p> <p>Shipping destinations for all BPA substations and storage yards.</p> <p><i>Retention Schedule: NI-305-07-1-23/a</i> <i>Retain until superseded, then destroy</i></p>	NSLT
TT-12-15	<p>Customs--Import/Export</p> <p>Records of all import and export shipments made on behalf of BPA. Special U.S. Customs forms required for import and export.</p> <p><i>Retention Schedule: GRS-9/1(a)&(c)</i> <i>Retain for 6 years and then destroy.</i></p>	NSLT
TT-12-16	<p>Freight Rates</p> <p>Material relating to freight rates from commercial carriers for studies and movement of BPA equipment and materials.</p> <p><i>Retention Schedule: GRS-9/1(a)&(c)</i> <i>Retain for 6 years and then destroy.</i></p>	NSLT
TT-12-17	<p>Rail, Truck, Ship Reports & Tracing Sheets</p> <p>Material relating to shipment of BPA materials and equipment from the contractor's plant to BPA by rail, truck and ship.</p> <p><i>Retention Schedule: GRS-9/1(a)&(c)</i> <i>Retain for 6 years and then destroy.</i></p>	NSLT

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
TT-13	<p>Land and Sea Vehicles</p> <p>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.</p> <p><i>Retention Schedule: GRS-10/1</i> <i>Retain for 2 years and then destroy.</i></p>	NSLU
TT-13-11	<p>Fleet Management</p> <p>Material relating to GSA fleet management [motorpools and vehicle assignments].</p> <p><i>Retention Schedule: GRS-10/7</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	NSLU
TT-13-12	<p>Assignment Records</p> <p>Material relating to assignment of BPA-owned vehicles.</p> <p><i>Retention Schedule: GRS-10/7</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	NSLU
TT-13-13	<p>Service Requests</p> <p>Material relating to the service and repair of government-owned vehicles.</p> <p><i>Retention Schedule: GRS-10/2(b)</i> <i>Retain for 1 years and then destroy.</i></p>	Z
TT-14	<p>Aircraft</p> <p>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.</p> <p><i>Retention Schedule: NI-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TC

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
TT-14-11	<p>Fixed Wing</p> <p>Material relating to the usage of fixed wing aircraft including registrations and insurance.</p> <p><i>Retention Schedule: NI-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TC
TT-14-12	<p>Helicopter</p> <p>Material relating to the usage of helicopters including registrations, insurance and noise complaints.</p> <p><i>Retention Schedule: NI-305-07-1-11/b</i> <i>Retain while Active + 3 years, and then destroy.</i></p>	TC
TT-14-13	<p>Flight Logs</p> <p>Records of flight logs for all aircraft [fixed wing and helicopter].</p> <p><i>Retention Schedule: NI-305-07-1-11/b</i> <i>Retain while Active + 5 years, and then destroy.</i></p>	TC
TT-14-14a	<p>Aircraft Maintenance - Maintenance and Alteration of Aircraft</p> <p>Material relating to maintenance and alteration of each aircraft and of each engine, propeller, rotor and appliance of an aircraft.</p> <p><i>Retention Schedule: NI-305-07-1-GRS-10/12</i> <i>Retain while Active + 6 years, and then destroy.</i> <i>Active period ends upon sale of aircraft.</i></p>	TC
TT-14-14b	<p>Aircraft Maintenance - Time in Service of Aircraft</p> <p>Materials relating to total time in service for each aircraft.</p> <p><i>Retention Schedule: NI-305-07-1-GRS-10/12</i> <i>Retain while Active + 6 years, and then destroy.</i> <i>Active period ends upon sale of aircraft.</i></p>	TC
TT-15	<p>Fuel</p> <p>Material relating to the consumption of fuel for vehicles.</p> <p><i>Retention Schedule: NI-305-07-1-11/b</i> <i>Retain for 3 years and then destroy.</i></p>	NSLU

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
TT-15-11	<p>Fuel Utilization</p> <p>Material relating to BPA's fuel utilization.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain for 3 years and then destroy.</i></p>	NSLU
TT-15-12	<p>Fuel Logs</p> <p>Material relating to BPA's vehicle fuel logs.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain for 3 years and then destroy.</i></p>	NSLU
TT-15-13	<p>Fuel Inventory Report</p> <p>Monthly reports of fuel inventory in fuel tank.</p> <p><i>Retention Schedule: N1-305-07-1-11/b</i> <i>Retain for 3 years and then destroy.</i></p>	NSLU
TT-16	<p>Domestic Travel</p> <p>Documentation of policies and procedures for travel for temporary duty travel entitlement. Includes policies for groups such as apprentices, interviewees, guests and witnesses. Includes the Direct Bill Lodging Program. Also known as temporary duty (TDY). See also TT-11, Employee Travel.</p> <p><i>Retention Schedule: GRS-9/4(a)</i> <i>Retain for 2 years and then destroy.</i></p>	FTD
TT-17	<p>Foreign Travel</p> <p>Documentation of policies and procedures for employee travel to foreign countries. Includes travel coordination, internal approvals and foreign travel advisories. See also TT-11, Employee Travel and TT-11-11, Official Passports.</p> <p><i>Retention Schedule: GRS-9/3(a)</i> <i>Retain for 6 years and then destroy.</i></p>	FTD

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, DISPOSITION	OFFICE OF RECORD/ORIGIN
TT-18	Relocations Documentation of policies and procedures for employee relocations. Includes eligibility, shipment of household goods, real estate claims, relocation income tax allowances [RITs] and temporary extensions. Also know as permanent change of station [PCS]. See also TT-11, Employee Travel. <i>Retention Schedule: GRS-9/4(a)</i> <i>Retain for 2 years and then destroy.</i>	FTD