SCHEDULE LOCATOR NO.: 104

REVISION DATE: 8/27/2009

TITLE: Information Technology (IT) Capital Investment Records

PRINCIPAL OFFICE: Department-wide

NARA DISPOSITION AUTHORITY: GRS – See disposition instructions

DESCRIPTION:

Records documenting the integration of IT investments with Department-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; and clearance and review records.

Note: Records needed to support contracts are scheduled under GRS 3.

DISPOSITION INSTRUCTIONS:

a. IT Capital Investment Records [GRS 27, Item 3]

   TEMPORARY

   Cut off annually. Destroy/delete 7 years after cutoff or when no longer needed, whichever is later.

   1. HPCPIC-HP Capital Planning and Investment Control master data files

      HPCPIC supports the IT capital planning and investment control process. System data includes business case information such as project plans, risk management plans, and lifecycle cost information.

      TEMPORARY

      Cut off annually. Destroy/delete 7 years after cutoff or when no longer needed, whichever is later.

IMPLEMENTATION GUIDANCE:

Follow the disposition instructions in ED 086 Information Systems Supporting Materials for system software; input/source records; output and reports; and system documentation.

ARRANGEMENT/ANNUAL ACCUMULATION:

PREVIOUS NARA DISPOSITION AUTHORITY:
ED Records Schedule

SPECIFIC LEGAL REQUIREMENTS:

SPECIFIC RESTRICTIONS:

LINE OF BUSINESS: Administration/Departmental