

Information on Guide to Record Retention

A PG&E Guide to Record Retention has been prepared and is available for viewing and downloading on this site.

CAUTION: Retention periods shown on the guide are only valid as of the date the guide is printed or posted on this site. Additional retention may be necessary to comply with other legal requirements or regulation changes placed into effect after the posting or printing of the guides.

Officers or their designees may add additional records to the Guide to Record Retention by forwarding a list of additions to the Records Center, 2850 Bayshore Boulevard, Brisbane. The list must specify the exact title of the record, the form or report number (if applicable), and all essential retention period information.

For additional information contact the Records Center on PG&E Extension 8-579-2281.

(Rev 3 - Dated September 23, 2003)

GTR0002424

PACIFIC GAS & ELECTRIC COMPANY GUIDE TO RECORD RETENTION

ACCOUNTING & CORPORATE RECORDS

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Accounting Data Sheet	62-4226	Controller	Retain for the period prescribed for the item to which it relates where necessary to a proper explanation of same. 6 years
Accounts Payable Ledger		FERC 15B	6 years
Accounts Payable System Payment		FERC 14A	6 years
Accounts Receivable		FERC 16	<ol style="list-style-type: none"> 1. Records of accounts receivable pertaining to sales of utility plant retain 3 years after settlement. 2. Records of register of accounts receivable & indexes thereto & summaries of distribution retain 3 years after settlement. 3. Accounting copies of invoices issued & supporting documents retain 3 years after settlement. 4. Accounting copies of authorizations for charges and supporting documents retain 3 years after settlement. 5. Periodic statements of unsettled accounts, except trial balances may be destroyed at option. 6. Schedules of invoices to be issued may be destroyed at option.
Additions & Betterments To Plant Adjustment Form - All Types		FERC 30A Controller	50 years Retain for period prescribed for the item to which it relates where necessary to a proper explanation of same
Advertisements		FERC 66A	6 years for copies of advertisements by the company in behalf of itself or any associate company in newspapers, magazines and other publications including records thereof. (Excluding advertising of product, appliances, employment opportunities, services, territory, routine notices and invitations for bids for securities, all of which may be destroyed at option)
Agreement - General		FERC 7	6 years after expiration of agreement or 25 years after disposal for agreements involving the acquisition or disposal of investments.
Agreement - Rental		FERC 7C	6 years after expiration or cancellation
Agreement For Acquisition Of Goods		FERC 7/40A	6 years after expiration or cancellation
Agreement For Performance Of Services		FERC 7/40A	6 years after expiration or cancellation
Agreement To Install Facilities Or Perform Work	62-4527	FERC 7	6 years after expiration or cancellation

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ACCOUNTING & CORPORATE RECORDS

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Annual Report To C.P.U.C.		FERC 65A	Permanent
Annual Report To F.E.R.C.		FERC 65A	Permanent
Appraisals		FERC 34	3 years after disposition, termination or write off of property or investment.
As-Built Records Of Facilities		FERC 36A	Life of facility
Auditor & Accountant Reports		FERC 8A	7 years after date of report or FERC commission audit, whichever comes last.
Auditor Accomplishment Report	62-3750	FERC 61B	2 years after date of the report
Authorization For Payment Of Vouchers		FERC 15D	6 years
Authorization To Return Material		FERC 40	6 years
Authorization To Travel Company Business	62-3279	FERC 15D	6 years
Automatic Data Processing Records		FERC 9	<ol style="list-style-type: none"> 1. Retain original source data used as input for data processing & data processing report printouts for the applicable periods prescribed elsewhere in this schedule. 2. Punched cards, tapes or similar media used as intermediate records or steps in data processing for assembling data to be posted to the records of the company or used in a report or study may be destroyed at option. 3. Program documentation and revisions thereto retain as long as it represents an active viable program or for periods prescribed for related output data, whichever is shorter.
Automotive Complaint History	62-6669	Controller	1 year after vehicle is sold
Automotive Job Order	62-5593	Controller	90 days
Average Annual Unit Cost Reports		FERC 30A	50 years
Bank Deposits Books & Reconciliation		FERC 58	Destroy at option after completion of annual audit by independent accountants
Bill Of Lading - Short Form	62-3400	FERC 40A	8 years
Bonds - Canceled		Corporate Secretary	15 years destroy by shredding
Budgets And Forecasts		FERC 62	3 years
Building History Cards		FERC 38A	Retain until facility is retired
Cash Books, General, Subsidiary, Auxiliary		FERC 13	10 years after close of fiscal year

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Check Register	R255CS	FERC 59F	6 years
Check Stubs		FERC 59F	6 years
Check Vouchers And Supporting Documents		FERC 15A	6 years
Checks - Canceled		FERC 58F	Includes refund checks, freight checks, voucher checks Retain 6 years Destroy by shredding
Claim Clearance Transcript	71-440B	Controller	6 years
Claims - Materials & Supplies		FERC 40A	6 years (Unless related to Employee Injury or Third Party Claims)
Combined Shipping Notice And Transfer (Or Correction Record)	62-3689	FERC 40A	6 years
Compliance Mailings - Debt Agreements, etc.		Corporate Secretary	5 years
Contract - Acquisition Or Disposal Of Investments		FERC 7F	25 years after disposal
Contract - Acquisition Or Sale Of Plant		FERC 37A	6 years after plant is retired.
Contract - Building		FERC 7/40A	6 years after expiration or cancellation
Contract - Change Order	62-4675	FERC 7G/40B	For the same period as contracts to which they relate.
Contract - General	62-4073	FERC 7/40A	6 years after expiration or cancellation
Contract - Sale Of Scrap		FERC 43B	3 years (Includes authorization for sale)
Contract - Short Form	62-4524	FERC 7/40A	Acquisition of goods or performance of services 6 years after expiration or cancellation
Contract - Supporting Documents		FERC 7G/40B	For the same period as contracts to which they relate.
Contract - With Other Utilities		FERC 7B	6 years after expiration or cancellation (sale or interchange of product)
Contract Work Authorization	62-4228	FERC 7G	For the same period as contracts to which they relate.
Contractors Performance Evaluation	62-4057	Controller	3 years
Correspondence - All Types		FERC 63A	Retain for the period prescribed for the item to which it relates where necessary to a proper explanation of same.

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Correspondence Line Up	62-4772	FERC 63A	Retain for the period prescribed for the item to which it relates where necessary to a proper explanation of same 1 year
Daily Stores Report	R400MIL	Controller	
Daily Time Reports		Controller	1. Daily time cards (employee report of time, mileage or construction equipment usage and crew time sheets (various)) should be filed and retained at originating field locations for two years. (PHOENIX)
Deeds & Other Title Papers		FERC 6B(1)	Permanent (including abstracts of title & supporting data)
Dues & Donation Reports		Controller	6 years
Electric Minor Material Requisition		FERC 42D	Retain 6 years Form 62-3716 bolts to fuses overhead Form 62-4054 sleeves to miscellaneous overhead Form 62-3715 underground See Daily Time Cards
Employee Report Of Time, Mileage Or Equipment Usage	62-5670	Controller	
Employee Report Of Time-Mileage Or Const. Equipment	62-3064	Controller	
Employee Time Record		Controller	6 years
Engineering Records Drawings & Support Data		FERC 36A	Records pertinent to the constructed facility retain until superseded or 6 years after the facility is retired. If construction of facility does not result, destroy at option after a complete accounting of expenses incurred.
Er70 - Detail Time Report Nonproductive Time Taken Facility Order Status Report Substore	R707ER	FERC 18C	6 years
Field Invoice System Records		Controller	1 year
Fixed Distribution Payroll		FERC 15B	6 years
Franchise Agreements		FERC 18C	6 years
Franchise Payments - City & County		FERC 6B(3)	Permanent
Franchise Tax Reports		FERC 15B	6 years
Franchise Work Sheets		FERC 6B(3)	Permanent
		Controller	6 years

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ACCOUNTING & CORPORATE RECORDS

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Freight Accounting Data	71-4486	FERC 42C	8 years
Gas Minor Material Requisition - Plastic System		FERC 42D	Form 62-3579 plastic system Form 62-3680 steel system/miscellaneous Form 62-3777 gas servicemen 6 years
General & Subsidiary Ledgers		FERC 10A2	50 years
GM Job Foldiers		FERC 32	Permanent
History Records - Equipment		FERC 23P	Life of Equipment
Incoming Transfer Orders Substore		FERC 42D	6 years
Insurance Policies & Related Documents		Insurance Department	Permanent
Intent To Const Application/Authorization Cancelled		FERC 36-2	Retain until after complete accounting of expenses is incurred.
Intention To Construct & Authorization		FERC 36-1	Permanent
Inventories		FERC 41B	Destroy at option after completion of annual audit by independent accountants
Material & Supplies		Controller	6 years
Inventory Accounting Dollar Adjustment	71-2816		
Invoice List	R057AL	Controller	3 years
Invoice Register	R056AL	FERC 15B	6 years
Invoices & Bills (Original)		FERC 15B	Paid and cancelled invoices showing detailed distribution of charges - Retain 6 years See retention periods for Gm's & Work Orders
Job Estimate	62-6251	FERC 32	50 years
Journal Entries (Originals)		FERC 12A	50 years
Journal Entry Construction Accounting	61-4271	FERC 12A	50 years
Journal Entry Corporate Accounting	61-4272	FERC 12A	50 years
Journal Entry Payment Accounting	71-4802	FERC 12A	50 years

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Journal Entry Back-Up Documentation		Controller	50 years
Journal Vouchers (Originals)		FERC 12A	50 years
Journals, Journal Voucher Registers & Controls		FERC 11	50 years
Labor Distribution		FERC 12	Records showing accounting distribution of payroll Retain 6 years
Land Maps		FERC 8B(1)	6 years after property is disposed of unless surrendered to transferee.
Leases - Rental Of Company Property		FERC 7C	6 years after expiration or cancellation.
Leases - Rental Of Property From Others		FERC 7C	6 years after expiration or cancellation.
List Of Bills Paid	62-4589	Controller	6 years
Local Order	62-3110	FERC 40A	6 years
Local Order - Log Book		FERC 40A	6 years
Mainpower Utilization Office Data Sheets		Controller	6 years
Manuals Of Instructions		FERC 29B	Destroy at option after expiration or supersession
Material & Supplies Recapitulations		FERC 42C	Materials and supplies registers showing material codes, quantity, and detailed accounting distribution of materials and supplies issued and returned during accounting periods. Retain 6 years
Material Failure Reports	75-228	Controller	6 years
Material Procurement Orders		FERC 40A	6 years
Material Receiving Report	R125MM	FERC 40A	6 years
Material Supply Tickets		FERC 40A	6 years
Mileage Reconciliation		Controller	6 years
Minute Books		FERC 6A	Minute books of stockholders, directors and directors committee meetings. Retain - Life of Corporation
Minutes Of Meetings		FERC 63B	Destroy at Option

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ACCOUNTING & CORPORATE RECORDS

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Monthly Mileage Report		Controller	Form 61-8503 - 6 years R8507E - 6 years
Monthly Revenue Reports		FERC 51	6 years
Notice Of Receipt Accounting Data	71-4547	Controller	6 years
Notification Of Activity Or Accounting Data Change		Controller	Form 62-3766 fixed distribution employee Form 62-4011 fixed distribution employee supplement 6 years
Organization Charts & Diagrams		FERC 6D	Destroy at option after expiration or supersession.
Overtime Reports		FERC 18A	6 years
Partial Receiving Record	62-3207	FERC 40A	5 years
Payroll Change	62-7028	FERC 18E	3 years (Retain one copy in employee 701 file) Destroy by shredding
Payroll Time Sheets Or Time Cards		FERC 18A	6 years - See Daily Time Reports for Phoenix Systems
Permits - Encroachment		FERC 6C(1)	6 years after expiration or cancellation
Permits - Temporary Nature (Municipal)		FERC 6C(1)	6 years after expiration or cancellation
Permits For Use Of Company Facilities		FERC 6C(2)	6 years after expiration or cancellation.
Permits For Use Of Facilities Of Others		FERC 6C(1)	6 years after expiration or cancellation.
Personal Car Usage On Company Business Mileage Report	62-4804	Controller	6 years
Party Cash Reimbursement	62-3764	FERC 15A	6 years
Photograph Identification Sheet	62-8332	S.H. & C.	Retain for the period prescribed for item to which it relates where necessary to a proper explanation of same
Plastic Pipe Audit		Controller	1 year
POF/S Receiving Records		FERC 42C	6 years
Predecessor Company Records		FERC 64	Retain for the period prescribed for similar records of PG&E.
Property Tax Receipts		FERC 15B	6 years

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ACCOUNTING & CORPORATE RECORDS

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Purchase Order Summary Report - Past Due		Controller	1 year
Purchase Orders		FERC 40A	6 years
Receipt - PG&E	62-3756	Controller	6 years
Receipts For Payment By Vouchers		FERC 15B	6 years
Receiving Report - Substore	R426ML	Controller	3 years
Record Of Bids	62-3055	FERC 40B	Retain for the period prescribed for the item to which it relates where necessary to a proper explanation of same 6 years
Reimbursement For Personal Expense Company Business	62-3759	FERC 15A	6 years
Report Of Time Worked On Exception Basis	62-4095	FERC 18B	For non-time card employees special distribution 6 years
Request For Check	62-4129	Controller	3 years
Request For Meal Reimbursement	62-3765	FERC 15A	6 years
Request For Special Fund Reimbursement	62-3763	FERC 18D	3 years
Requisition - Materials (Originals)	62-9049	FERC 42D	Requisitions showing material codes, quantity, and detailed accounting distribution of materials and supplies issued and returned. Retain - 6 years (with D&C tags - retain until audited by state taxing agency)
Return Material Shipping Notice	62-3056	Controller	6 years
Revenue Reports - Gas & Electric		FERC 51	6 years
Sales Of Scrap & Materials & Supplies		FERC 43B	3 years
Sales Tax		Controller	5 years
SEC - Manual Signatures to Electronically Filed Documents		SEC Reg.S-T, Rule 302	5 years - Corporate Secretary
Shipping Notice		Controller	5 years
Sick Time Reports	62-4680	FERC 40A	6 years
Specifications For Constructed Facilities		Controller	8 years

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ACCOUNTING & CORPORATE RECORDS

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Standard Practices Statistical Reports Stock Certificates - Canceled		Controller FERC 29B FERC 61B	Permanent Destroy at option after expiration or supersession 1. 10 years after date of report for annual financial, operating and statistical reports regularly prepared in the course of business for internal administrative or operating purposes (and not used as the basis for entries to accounts of the companies concerned) to show the results of operations and the financial condition of the utility. 2. 2 years after the date of the report for quarterly, monthly or other periodic financial, operating and other statistical reports as above. 3. Destroy at option statistical reports prepared for internal administrative or operating purposes only and not used as the basis for entries to the accounts of the company.
Stock Status Report - Substore		Corporate Secretary	10 years Destroy by shredding
Tax Reports	RD41MI	Controller	1 year
Tax Sheets - Monthly		Controller	6 years
Time & Segregation Sheets		Controller	6 years
Time Record		FERC 18B	6 years - See Daily Time Cards
Transaction Register	62-6296	Controller	See Daily Time Cards
Transformer Orders From Other Stores	R053AL	Controller	2 years
Transmittal List Daily Time/Mileage Report		Controller	2 years
Transportation Back-Up Documentation	61-6688	FERC 18A	6 years
Tree Trimming Bills		FERC 12	6 years
Trial Balance		FERC 15B	6 years
Unidentifiable Payments		FERC 10C	2 years
Valuations		FERC 15A	6 years
Vehicle Application & Mileage Report		FERC 34	3 years after disposition termination or write off of property or investment

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ACCOUNTING & CORPORATE RECORDS

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Vendor Account Books	62-4188	Controller	6 years
Vendor Name And Address Cards	R059AL	Controller	6 years
Verification Log - Substore	62-3467	Controller	6 years
Voucher Register	R065MM	Controller	1 year
Work Order Job Folders	R054AL	FERC 14A	6 years - voucher registers or similar records when used as a source document
Work Orders - Maintenance		FERC 32	Permanent
Work Orders - Transportation		FERC 26B	6 years
Write Off Reports		FERC 26B	6 years
		Controller	Retain for period prescribed for the item to which it relates where necessary to a proper explanation of same

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HUMAN RESOURCES

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Affirmative Action Plan		Human Resources	6 years
Application For Transfer		Human Resources	1 year
Apprentice Cable Splicer Record Of Training Hours	62-3175	Human Resources	1 year after employee completes apprentice program
Apprentice Lineman On Job Training Hours	62-3051	Human Resources	1 year after employee completes apprentice program
Closed Job Vacancies		Human Resources	7 years
Contract - Employees/Labor		FERC 7D	Contracts with individual employees, labor union, company unions and other employee organizations relative to wage rates, hours and similar matters. 6 years after expiration or cancellation Until superseded
Description Of Qualifications Management Employees	62-3328	Human Resources	7 years after termination of employment Destroy by Shredding
Employee 701 Files		Human Resources	6 years Destroy by Shredding
Employee Misconduct Reports		Human Resources	4 years after suggestion is closed
Employee Suggestion Ideas In Action	62-8294	Human Resources	Not hired - 6 years Hired - 6 years after termination of employment Destroy by Shredding
Employment Applications	62-3290	Human Resources	Not hired - 6 years Hired - 6 years after termination of employment Destroy by Shredding
Employment Medical Forms	62-3291	Human Resources	Not hired - 6 years Hired - 6 years after termination of employment Destroy by Shredding
Employment Resumes		Human Resources	Not hired - 6 years Hired - 6 years after termination of employment Destroy by Shredding
Employment Tests		Human Resources	Not hired - 6 years Hired - 6 years after termination of employment Destroy by Shredding
Flex Enrollment Documents		Human Resources	6 years - Destroy by Shredding
Garnishments		FERC 18	6 years - Destroy by Shredding
Grievance Files		Human Resources	Permanent

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HUMAN RESOURCES

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Health Care related information--PHI		HIPAA-Human Resources	6 years
Ideas In Action District/Division Evaluation	62-3391	Human Resources	4 years after suggestion is closed
Interviewer's Evaluation Summary	62-3270	Human Resources	6 years
Job Vacancy Records		Human Resources	2 years
Labor Studies		FERC 81C	Destroy at option
Management Incentive Plans		Human Resources	Until superseded or canceled
Merit Plan		Human Resources	6 years
Performance Review Meter Reader Type I	62-3718	Human Resources	Until superseded or revised Destroy by Shredding
Performance Review Meter Reader Type II	62-3718	Human Resources	Until superseded or revised Destroy by Shredding
Performance Review Meter Reader Type III	62-3720	Human Resources	Until superseded or revised Destroy by Shredding
Performance Reviews		Human Resources	Until superseded or revised Destroy by Shredding
Personnel Referral Form	62-3271	Human Resources	1 year
Personnel Requisitions	62-3268	Human Resources	1 year
Position Description	62-3327	Human Resources	Until superseded or canceled
Training Record Apprentice Mateman	61-6156	Human Resources	1 year after employee completes apprentice program
Training Records - Safety		IIPP Standard Practice	Cal/OSHA regulations, implemented by PG&E's IIPP Standard Practice, require safety training be provided to all employees whenever a new hazard, process, equipment or procedure is introduced into the workplace. The records of training shall include the names of employees and instructor(s), and the type and date of training. Retain - 3 years
Welding Qualification Records		Human Resources	5 years

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ENVIRONMENTAL AFFAIRS

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Environmental Records	N/A	Law	Document retention periods for environmental documents vary considerably. Environmental documents are most commonly required to be stored five (5) years. However, before disposal, the document originator should determine whether all statutory and regulatory requirements for document retention have been satisfied. (When in doubt, consult with Environmental Affairs or the Law Department.)

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PACIFIC GAS & ELECTRIC COMPANY GUIDE TO RECORD RETENTION

SAFETY AND HEALTH

USP 22, SAFETY AND HEALTH PROGRAM RECORDS	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
<p>1. Document and Maintenance Records of the Safety and Health Program for historical data as outlined in USP 22</p>		USP 22	Local organization retains for 3 years.
<p>2. Arsenic</p> <ul style="list-style-type: none"> a. Exposure monitoring records b. Medical records c. Training records and materials d. Written compliance plan 		CCR, Title 8, Section 5214	<ul style="list-style-type: none"> 2a. SH&C and/or local organization retains for 40 years or duration of employment + 20 years, whichever is longer. 2b. SH&C or medical contractor retains for 40 years or duration of employment + 20 years. 2c. Local organization or Learning Services retains the most current document. 2d. SH&C retains current plan until revised or superseded.
<p>3. Asbestos</p> <ul style="list-style-type: none"> a. Bulk materials analysis b. Exposure monitoring records c. Medical surveillance records d. Any communications concerning the identification, location and quantity of ACM and PACM, written records of such notifications and their content. e. Training records and materials f. Written compliance program 		SHC Procedure 227 CCR, Title 8, Sections 1529 & 5208	<ul style="list-style-type: none"> 3a. Local organization retains for duration of facility ownership. 3b. SH&C or local organization retains for 30 years. 3c. SH&C retains for the duration of employment + 30 years. 3d. Retain for the duration of the ownership of the building and shall be transferred to successive owners. 3e. Local organization retains for the duration of employment + 1 year. 3f. SH&C retains current program until revised or superseded.

HR Learning Services is responsible for retaining training documentation for all courses they conduct beginning in April 2000.

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SAFETY AND HEALTH

USP 22, SAFETY AND HEALTH PROGRAM RECORDS	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
4. Blood Borne Pathogens a. Training records and materials b. Vaccination records & declination forms c. Medical evaluation records d. Reports of Potential Exposure to BBP (Exhibit G in our written program) e. Exposure control plan		SH&C's written program, and CCR, Title 8, Section 5193	4a. Local organization or HR Learning Services retains the most current document. 4b. SH&C retains for duration of employment + 30 years. 4c. SH&C retains for duration of employment + 30 years. 4d. Local organization retains for 3 years. 4e. SH&C retains current plan until revised or superseded.
5. Design and System/Change Management Review a. Delegation Matrix b. Established Organizational Trigger c. Compliance and Formal Reviews		SH&C Procedure 206	Local organization retains for 3 years.
6. Ergonomics Program a. Ergonomic evaluations b. Actions taken to control RMI risk factors c. Follow-up evaluations and control strategy changes d. Training records and materials: Records of annual ergonomics training (as required by the Procedure 221) and specialized training (as required by the CAL OSHA Ergonomics Standard)		SH&C Procedure 221 and CCR, Title 8, Section 5110	6a-c. Local organization retains for 3 years. 6d. Local organization or HR Learning Services retains the most current document.

HR Learning Services is responsible for retaining training documentation for all courses they conduct beginning in April 2000.

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SAFETY AND HEALTH

USP 22. SAFETY AND HEALTH PROGRAM RECORDS	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
7. Explosives Program: Training records and materials a. Initial Training Training for prospective blasters and material to pass the test for the blasters license b. Refresher Course (have not used for a period of 12 months) c. Refresher Course -- 8 Hr Course Requirement Upon nearing completion of State License (5 years)		BCCR 344.20, 1550, 1574, 5276 and 5322	7a-c. Local organization or HR Learning Services retains the most current document.
8. First Aid a. First Aid Plans b. Inspection records c. Documentation that communication has been delivered to employees regarding this procedure. d. Training Record Documentation 1) Initial Certified Basic First Aid/CPR 2) Certified Basic First Aid/CPR Refresher 3) Initial Awareness Training 4) Biannual Awareness Level Training		SH&C Procedure 229	8a. Local organization retains annually 8b. Local organization retains 3 years 8c. Local organization retains annually 8d1. Duration of Employment 8d2. Local organization or HR Learning Services retains the most current document. 8d3. Duration of Employment 8d4. Local organization or HR Learning Services retains the most current document.

HR Learning Services is responsible for retaining training documentation for all courses they conduct beginning in April 2000.

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SAFETY AND HEALTH

USP 22. SAFETY AND HEALTH PROGRAM RECORDS	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
9. Hazard Communication Program a. Chemical product inventories (each workplace) b. Material Safety Data Sheets (MSDS) c. Initial training records and materials and training on new chemical updates for any information d. Prop 65 notice e. Hazard Communication program		Hazard Communication written program and CCR, Title 8, Section 5194	9a. Local organization retains the most current document. 9b. Local organization retains the most current document. 9c. Local organization retains for duration of employment. 9d. Local organization maintains and retains as long as the product is in inventory. 9e. SH&C retains current program until revised or superseded.
10. Hazard Evaluation and Control a. Delegation Matrix b. Hazard Control Strategy Summaries and supporting documentation c. Hazard Control Benefit/Cost Workbook, where applicable d. Documentation that communication has been delivered to employees regarding this procedure		SH&C Procedure 205	Local organization retains for 3 years
11. Hazardous Chemicals In Laboratories (TES) a. Chemical hygiene plan b. Exposure monitoring records c. Medical records		CCR, Title 8 Section 304	11a. Local organization retains current plan until revised or superseded. 11b. SH&C or local organization retains for 30 years 11c. SH&C or medical contractor retains for the duration of employment + 30 years.
12. Hazardous Condition Reporting a. Completed standardized Hazardous condition report forms b. Documentation that communication has been delivered to employees regarding the hazardous condition reporting procedure.		SH&C Procedure 201	Local organization retains for 3 years.

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SAFETY AND HEALTH

USP 22, SAFETY AND HEALTH PROGRAM RECORDS	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
13. Hearing Conservation Program a. Noise records b. Audiometric test results c. Initial annual training & STS training records		SH&C Procedure 222 and CCR, Title 8, Section 5097(c)(6)	13a. SH&C retains for 30 years 13b. SH&C retains for duration of employment. 13 c. Local organization or HR Learning Services retains the most current document.
14. Incident Notification, Investigations & Analysis a. Completed investigation and analysis forms, including supporting documentation for information gathered, specific action plans, and communication of the incident. b. Training records and materials.		SH&C Procedure 202	14 a. Local organization retains for 3 years. 14 b. Local organization or HR Learning Services retains the most current document.
15. Inspections (Work Areas & Work Practices Assessments) a. Gap analyses of inspections – list of inspections to be conducted b. Completed inspection checklists c. Documentation that communication has been delivered to employees regarding the inspection procedure and results of an inspection d. Associated training records and materials		SH&C Procedure 203	15a-c. Local organization retains for 3 years. 15d. Local organization or HR Learning Services retains the most current document.
16. Job Safety Analysis (JSA) a. Job or Task Safety Analysis reports b. Training records and materials		SH&C Guideline	16a. Local organization retains for 3 years. 16b. Local organization or HR Learning Services retains the most current training records.

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USP 22, SAFETY AND HEALTH PROGRAM RECORDS	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
17. Near Miss a. Standardized near miss reporting report forms b. Documentation that communication has been delivered to employees regarding the near miss reporting procedure.		SH&C Procedure 208	Local organization retains for 3 years.
18. Lead a. Exposure monitoring records b. Medical records to include all medical surveillance & medical removal records c. Training records and materials d. Written compliance plan		CCR, Title 8 Section 5198	17a. SH&C or medical contractor retains for 40 years or duration of employment + 20 years, whichever is longer. 17b. SH&C or medical contractor retains for 40 years or duration of employment + 20 years, whichever is longer. 17c. Local organization or HR Learning Services retains the most current training records. 17d. SH&C retains current plan until revised or superseded.
19. Low Voltage Insulated Gloves & Tools a. Maintain documentation of the implementation process		SH&C Procedure 230	Local organization retains for 3 years.
20. Other Confined Space a. Air monitoring records b. Training records and materials c. Written operating procedures		CCR, Title 8, Section 5158	19a. Post at worksite for duration of job. 19b. Local organization retains until re-trained. 19c. Local organization retains current operating procedure until revised or superseded.
21. OSHA Citations		SH&C Policy	SH&C permanently retains the record.

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USP 22, SAFETY AND HEALTH PROGRAM RECORDS	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
22. Permit Required Confined Space a. Written program (includes locations of permit spaces & their associated hazards) b. Permits (includes results of air monitoring) c. Training Certification Records		CCR, Title 8, Section 5157	221a. Local organization retains for 1 year for review of the written program. 221b. Post permits at worksite while work is in progress and retain for one year. 221c. Local organization retains until re-training occurs.
23. Radio Frequency a. Copy of the RF Organizational Plan b. Records of equipment evaluation c. Records documenting employee training		SH&C 228	22a&b. Local organization retains for 3 years. 22c. Local organization or HR Learning Services retains the most current document.
24. Regulatory Agency Inspections or Investigations a. Any Citations, or copy of citations, issued by a regulatory agency b. Documentation that communication has been delivered to employees regarding this procedure.		SH&C Procedure 207	Local organization retains for 3 years.
25. Respiratory Protection Program a. Exposure monitoring records b. Local respiratory protection program plan c. Medical clearances d. Medical records e. Respirator fit tests f. Training records and materials		SH&C Procedure 223 and CCR title 8, Section 5144	24a. SH&C or local organization retains for 30 years. 24b. Local organization retains current document until revised or superseded. 24c. Local organization retains current document until revised or superseded. 24d. SH&C to retain for the duration of employment + 30 years. 24e. Local organization retains until the next fit test is administered. 24f. Local organization or HR Learning Services retains the most current document.

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SAFETY AND HEALTH

USP 22, SAFETY AND HEALTH PROGRAM RECORDS	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
26. Safety at Heights Training records and materials a. Initial training (includes one-time only and baseline training) b. As needed training (includes updates or additions to training components)		8CCR§ 3270.1	25a&b. Local organization or HR Learning Services retains the most current document.
27. Tracking and Trend Analysis a. Tracking and trend analysis process prepared by Planning Team. Includes completed delegation matrix and organization plan. b. Data maintained to perform tracking and/or trend analysis. c. Summary reports.		SH&C Procedure 204	26a. Local organization retains as long as processes are underway plus 3 years. 26b. Retention periods are to be determined locally. 26c. Local organization retains for 3 years following the successful evaluation and control of the identified hazards.
28. Training & Training Materials a. Specific to programs listed in the Guide to Record Retention b. Initial training (includes one-time only and baseline training) c. Annual and periodic training (includes recurring training, and repeat/refresher training) d. As needed training (includes updates or additions to training components) The following constitutes documentation that a training course has been conducted: <ul style="list-style-type: none"> • A sign-in sheet that includes the date(s) of the training, type of training or topic, name of trainers or training provider, name of the attendee, and initial or signatures of attendees, and • An outline of the material or curriculum covered. These documents may be kept in hard copy form, microfiche, or electronically scanned.		SH&C's Cal/OSHA – Required Safety and Health Training Matrix	27a. Local organization or HR Learning Services retains for the time specified in each Program section. 27b. Local organization or HR Learning Services retains the most current document. 27c. Local organization or HR Learning Services retains the most current document. 27d. Local organization or HR Learning Services retains the most current document.

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SAFETY AND HEALTH

USP 22, SAFETY AND HEALTH PROGRAM RECORDS	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
<p>29. Work Area Protection Training records and materials</p> <ul style="list-style-type: none"> a. Initial training (includes one-time only and baseline training) b. As needed training (includes updates or additions to training components) 		8CCR§ 1588	28a&b. Local organization or HR Learning Services retains the most current document.

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THIRD PARTY CLAIMS

Completed forms are to be sent to the local claims investigator.

THIRD PARTY CLAIM RECORDS	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Incident Report	62-0719		
Damage to Third Party Underground Facilities Data Sheet	62-6242		
Overhead Line Contact Data Sheet	62-6117		
Damage to PG&E Underground Facilities Data Sheet	62-6422		
Motor Burnout Data Sheet	62-6423	SH&C Procedure 101	Third Party incidents that are the subject of the documents in the "Records Title" column are reported to and investigated under the exclusive authority of the General Counsel in anticipation of litigation and with the dominant purpose of defending, prosecuting or resolving claims. All documents prepared pursuant to SH&C Procedure 101, "Property Damage or Injuries Involving Third Parties" are intended to be privileged and kept confidential.
Fire Damage Data Sheet	62-6424		Employees generating documents identified in the "Records Title" column shall send to the appropriate SH&C Third Party Claims Investigator all incident documentation as soon as possible. <u>No copies of any incident documentation shall be retained by the organization, except in claim files that are being processed and resolved as delegated by SH&C.</u>
Vehicle Pole Accident Data Sheet	62-6421		
Report of Miscellaneous Accident – 3 rd Party/Miscellaneous	62-6226		SH&C Procedure 101 should be consulted for a complete review of incident investigations.
PG&E Photograph Identification Sheet	N/A		Third Party Claims must be retained 10 years from the date of the Incident. Claims that may result in future legal proceedings beyond the 10 year retention period may be retained permanently.
Evidence Record Envelope	62-0693		
Record of Evidence	62-6406		
Evidence Accepted for Storage	62-6407		

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WORKERS' COMPENSATION

Most records related to employee injuries are to be forwarded to Safety, Health & Claims - Workers' Compensation Section. (Exceptions are noted below.) All medical reports (including Doctor's First Report of Work Injury) must be retained by SH&C.

WORKERS' COMPENSATION RECORDS	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
1. Personal Physician Treatment Request Form	62-4068	SH&C Policy	Retain locally for term of employment. Retain original & forward copy to SH&C for permanent retention.
2. Report of Industrial Injury to Employee (Pink Slip)	62-4587	SH&C Policy	Retain locally for 2 yrs if injury or illness does not require medical attention or result in a lost time injury. If injury or illness is chemical or toxic exposure related, retain permanent.
3. Industrial Injury Reporting Forms - original to SH&C a. Employee's Claim for Workers' Compensation Benefits b. Accident Report - Employer's Report of Occupational Injury or Illness (on-line ROLL)	62-4586 DWC Form 1 DLSR Form 5020	SH&C Policy	Retain locally for the term of employment. SH&C to permanently retain these records.
4. Medical Referral Form for Industrial Injury	62-6015	SH&C Policy	Supervisor may maintain copy of pertinent medical information regarding work restrictions. Original must be forwarded to SH&C for permanent retention.
5. Request for Medical Evaluation and Opinion Regarding Industrial Causation	62-6065	SH&C Policy	Supervisor may maintain copy of pertinent medical information regarding work restrictions. Original must be forwarded to SH&C for permanent retention.
6. Log of Occupational Injuries and Illness	OSHA 300 Log	CCR, Title 8 Section 14301 and 14307	SH&C updates and retains for 5 years.
7. Annual OSHA 300 Log Summary	OSHA 300 Log	CCR, Title 8 Section 14035 and 14307	Post the annual summary log February through April. Retain 5 years of annual log summary at the OSHA establishment address.

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DISTRIBUTION & CUSTOMER SERVICES

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Absolving Service Agreements	62-0602	FERC 45C	1 year after expiration or cancellation
Account Change Record	62-4104	Rule 17 & 17.1	6 years
Adjustment Form Customer Services		CES	3 years
Agreement - Electric Service	62-4503	FERC 7	6 years after expiration or cancellation
Agreement - Insulation Financing		FERC 7	6 years after expiration or cancellation
Agreement - Outdoor Area Lighting	62-4908	FERC 7	6 years after expiration or cancellation
Agreement - Solar Certificate		FERC 7	6 years after expiration or cancellation
Agreement Street/Highway Lighting	62-4510	FERC 7	Supplied from distribution lines 6 years after expiration or cancellation Forms for governmental agencies - retain permanent
Agreement Street/Highway Lighting	62-4508	FERC 7	Customer owned electric system 6 years after expiration or cancellation
Application - Multi-Family Cashback	62-4115	CES	5 years
Application - Single Family Cashback	62-4114	CES	5 years
Application Form - New Const Rebate Program		CES	1 year after all rebates are completed
APS Tags	62-3801	CES	3 years
Audit Bill Summary Run		CES	5 years
Audit Request Summary	R4130E	CES	2 years
Audits - Multi-Unit Dwelling		FERC 24A	2 years
Bill Guaranty's	62-6123	CES	1 year beyond the last date that the account is secured by guaranty.
Bill Stubs		CES	6 months (if space available retain 1 year)
Billed Account Errors	R582CS	CES	2 years
Billing Change Order	62-0989	Rule 17 & 17.1	6 years
Cash Control Report	R2655C	CES	2 years
Cashbook Applications		CES	2 years
Chart - High Pressure Customer Gas Meter		CES	2 years
CIS Change Documents Microfilm		CES	4 years

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DISTRIBUTION & CUSTOMER SERVICES

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Claims - C.P.U.C.		CES	6 years
Closing Bills		CES	4 years
Closing Packet Not Assigned To Collection Agency		CES	4 years
Collection Activity Reports Closed Accounts	R019CS	CES	6 years
Collection Activity Reports Cycle Balance	R018CS	CES	6 years
Collection Activity Reports Deposits	R020CS	CES	6 years
Collection Agency Reports		CES	2 years
Collection Recapitulation	62-7175	CES	1 year
Complaint - C.P.U.C.		CES	8 years
Conservation Receivables	R303IF	CES	4 years
Contract - APS Signed		CES	3 years
Contract - Gas Service	B2 451B	FERC 48C	1 year after expiration or cancellation
Contract - New Business		FERC 45C	1 year after expiration or cancellation
Contract - Utility Plant Construction		FERC 37B	6 years after plant is retired.
Contracts			See Accounting & Corporate Records
Control Report	R252CS	CES	3 years
Correspondence - All Types		FERC 63A	Retain for the period prescribed for the item to which it relates where necessary to a proper explanation of same.
Correspondence - Customer Complaint To C.P.U.C.		CES	6 years
Correspondence Customer Services		CES	6 years
Credit Applications	R2-3253	CES	6 years (CIA application should be retained in excess of 6 years if the account remains open.)
Credit Deposit Cash Stubs	R543SC	CES	7 years
Credit Deposit Control Report	R266SC	CES	6 years after refund
Credit Deposit Detail Of Suspense List	R543CS	CES	3 months

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DISTRIBUTION & CUSTOMER SERVICES

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Credit Deposit Qualified For Refund	R206CS	CES	6 years after refund
Credit Deposit Route Transaction Report	R291SC	CES	6 years after refund
Credit Files	R796CS	CES	6 years
Cumulative Report Of Meter Reading		CES	1 year
Curtailment Records		CES	6 years
Customer Account Adjustment Tag	62-4104	CES	3 years
Customer Account Write-Off Authorization		CES	3 years
Customer Bill	R409CS	CES	4 years
Transaction Register		CES	4 years
Customer Bill Transaction Register Index	R410CS	CES	4 years
Customer Billing Information	62-4197	CES	1 year
Customer Billing Register	R407CS	CES	7 years or as may be necessary to comply with service rules regarding refund on fast meters.
Customer Deposit Receipts		FERC-47	5 years after refund
Customer Deposit Receipts For Interest		FERC-47	6 years after refund
Customer Deposit Records		FERC-47	6 years after refund
Customer Info. System Procedural Or Error/Problems	62-4006	CES	6 years
Customer Service Complaint Records		CES	4 years
Customer Service Tag Urgent	62-3126	CES	6 years
Customer Service Tags		CES	6 years
Customer Status Sheet		CES	6 years
Customer Uncollectible Account Cash Recap		CES	6 years
Customized Rebate Application		CES	6 years

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DISTRIBUTION & CUSTOMER SERVICES

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
D&C Customer Order	62-3306	CES	6 years
D&C Dept. Starting No. Tag	61-6485	CES	5 years
D&C Error Listing		CES	2 years
D&C Meter Transaction Orders	62-3131	CES	6 years
D&C Pickups For Meter Reading Errors	R568CS	CES	2 years
Daily Deposit Transaction Register	R200CS	CES	6 years
Delete Applicant Record	62-3392	CES	5 years
Deliver & Charge Job Order	62-3728	Controller	3 years
Deliver & Charge Monthly Clearance Summary		Controller	3 years
Deliver & Charge		Controller	3 years
Trial Balance Detail		Controller	3 years
Deliver & Charge		Controller	3 years
Trial Balance Summary			
Deposit Acct Due Full Lock Today Follow-Up Serials	R215CS	CES	1 year
Deposit Accts To Be Locked Today Follow-Up Sequence	R214CS	CES	1 year
Deposits To Be Locked Gotcha	R007CS	CES	1 year
Detail Of Suspense	R528CS	CES	2 years
Direct Deposit Authorization	71-4620	CES	Until superseded or canceled
Direct Rebate Application		CES	6 years
Direct Weatherization Records		CES	6 years
Electric Meter Transaction Record	62-3259	CES	3 years
Electric Metering Transformer Transaction	62-3258	CES	3 years
Electric Request For Service	62-3198	CES	3 years
Electric Service Contract	62-4504	CES	6 years after expiration or cancellation

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DISTRIBUTION & CUSTOMER SERVICES

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Electronic Meter Reading Audit Trail Report		CES	R-05 field condition report - 3 months R-06 - meter irregularity report - 3 months R-07 read condition report - 3 months R-08 free form remark report - 3 months R-10 new set report - 3 months R-14 terminal diagnostic report - 3 months R-17 audit trail report - 3 months R-20 meter change report - 3 months R-21 TCU detail report - 3 months
End Of Month Deposit Transaction Register	R204SC	CES	6 years after refund
Energy Management Audits		CES	6 years
Energy Management Incentives		CES	6 years
Energy Utilization Audit		CES	3 years
Energy Utilization Audit Callback		CES	3 years
Error Message Reports	R270CS	CES	2 years
Estimator Power Report 4 Week		CES	6 years
Field Automation System (FAS) Exceptions		CES	Retained electronically on "online query archives" for 7 years
Field Automation System (FAS) Exceptions When Proration Tool Is Used		CES	6 years
F.C.C. Radio & Television Complaints		CES	2 years
Field Service Tags	62-3125	CES	6 years (includes connection tags)
High Bill Complaint Record		CES	2 years
High Bill Inquiry		CES	2 years
High Bill Inquiry Investigation	62-4048	CES	2 years
Home Energy Audit & Zero Interest Program	62-3791	CES	3 years

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Home Energy Audit Coded Input Sheet	62-4004	CES	3 years
Home Energy Use Survey	62-3807	CES	3 years
Industrial Power		CES	10 years
Magnetic Tape Printouts			
Inspection Reports		CES	6 years
Customer Premises			
Insulation Report	R510IF	CES	2 years
Insulation Report	R710IF	CES	2 years
Insulation Suspense	R437IF	CES	2 years
Joint Pole Applications		CES	6 years after expiration or cancellation
Joint Pole D&C # Cross Reference List	R042SC	CES	5 years
Joint Pole Data Sheet Detail Of Billing		CES	6 years
Joint Pole Form #2 & 3 Error/Memo	R036SC	CES	5 years
Joint Pole Form #2 & 3 Input Register	R035SC	CES	5 years
Joint Pole Inspection Reports		CES	6 years
Lamp Reports		CES	4 years
Life-Support Customer Information	62-4246	CES	6 years from the date the customer and/or PG&E discontinues the additional medical baseline allowances
LifeLine Declarations		CES	6 years
LifeLine Verifications		CES	6 years
Loss & Theft Report	62-4800	CES	6 years
Magtape/Adjust Form/Sundries/Overcredit		CES	2 years
Marketing Reports			
Master Meter Conversion		CES	3 years
Memorandum Of Cash Slips		CES	6 years
Meter Books		CES	6 years

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Meter Calculation Sheet	61-6400	CES	6 years
Meter History	R019FM	CES	3 years
Electric Errors & Memos		CES	3 years
Meter History		CES	3 years
Gas D&C Error List			
Meter Reading Card - 5 Dial	62-3005	FERC 48C	1 year
Meter Reading Card - 9 Dial	62-3006	FERC 48C	1 year
Meter Tag - Correction		CES	6 years
Meterman Daily Work Sheets		CES	6 years
Electric Meter			
MLX & Suspense Deposits		CES	15 years or 4 years after entire amount is refunded.
MLX Agreements & Letters Closed		CES	15 years or 4 years after entire amount is refunded.
MLX Cleared		CES	15 years or 4 years after entire amount is refunded.
Files/Letters/Agreements			
MLX Deposits		CES	15 years or 4 years after entire amount is refunded.
MLX Registers - Inactive		CES	15 years or 4 years after entire amount is refunded.
MLX Rule 15 General Files		CES	15 years or 4 years after entire amount is refunded.
MLX Rule 16 General Files		CES	15 years or 4 years after entire amount is refunded.
MLX Suspense Trial Balance		CES	15 years or 4 years after entire amount is refunded.
Money Changes On Closing Bills	R917CS	CES	1 year
Month End Revenue & Statistical Reconciliation		CES	6 years
Monthly New Business Connected Report Residential	67-4696	CES	3 years
Monthly Record Of Overages & Shortages		CES	Detail by cash receivers - form 62-7209 & 62-7210 2 years
Multiple Domestic Meter Transaction Order	62-3208	CES	1 year
Multipurpose Customer Service Order		CES	Form 62-3458 & 62-3571 4 years
Net Rebates		CES	2 years

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DISTRIBUTION & CUSTOMER SERVICES

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
New Business File		CES	6 years for governmental or major customers 3 years all others
New Business Form For Specific Application		CES	6 years for governmental or major customers 3 years all others
New Business Project Files		CES	6 years for governmental or major customers 3 years all others
New Business Report - Routine		FERC 531	3 years
New Business Surveys		FERC 531	3 years
Notices Of Customer Hazard Notice		CES	6 years
Operating Error Reports		CES	6 years
PC Generated Report Electronic Meter Read		CES	2 months
PCSC Credit Modification Agreement		CES	6 years
PCSC If Reports	R440SC	CES	2 years
PCSC Zip Loan Qualifying Form	62-4155	CES	5 years
PG&E Application For Additional Medical Baseline Quantities	79-708	CES	6 years from the date the customer and/or PG&E discontinues the additional medical baseline allowances
PG&E Declaration Of Eligibility For A Standard Medical Baseline Quantity	62-3481	CES	6 years from the date the customer and/or PG&E discontinues the additional medical baseline allowances
Power Billing Order	62-3212	CES	3 years
Power Error Listing	R561CS	CES	2 years
Power Masterfiles	R671CS	CES	2 years
Power Time Of Use		CES	2 years
Prefigure/Medical Baseline Quantity Computation Sheet	62-3312	CES	6 years from the date the customer and/or PG&E discontinues the additional medical baseline allowances
Radio & Television Interference Report		CES	2 years
Rate Sheets/Schedules Of Utility Service (Copies)		FERC 40B	1 year after expiration or cancellation.

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DISTRIBUTION & CUSTOMER SERVICES

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Rate Sheets/Schedules Of Utility Service (Original)		FERC 46A	50 years including schedules suspended or superseded.
Raw Data Microfiche Report	R619CS	CES	7 years
RCS Inspector Accomplishment Report	62-3752	FERC 24A	2 years
Rebate Inspection Work Order	61-5088	FERC 24A	2 years
Rebates & Billings		FERC 52B	2 years or as may be necessary to comply with service rules regarding refunds on fast meters.
Receipts (Cash)		CES	3 years
Refund Draft Registers	R202SC	CES	9 years
Refund Drafts		CES	9 years
Report Of Overcredits	61-6271	CES	6 years
Request For Survey	62-3322	CES	1 year
Routes	R487CS	CES	2 years
Scheduled Rebate Inspection	62-3393	FERC 24A	2 years
Service Report Form (Blue Copy)		Law Department	30 Days
Service Applications Gas & Electric		CES	6 years
Special Facility-Gas & Electric Rule No. 2		CES	6 years after expiration or cancellation
Special Notice To Mobile Home Owners		CES	5 years
Street & Outdoor Lighting Outage Tag	62-5640	CES	6 years
Street & Outdoor Lighting Tag	62-3567	CES	6 years
Street Assessments		CES	6 years
Street Light Adjustment Tags		CES	4 years
Street Light Job Files		CES	6 years
Street Light Maintenance Records		CES	9 years
Street Light Master File		CES	Life of Equipment
Street Light Outage Records		CES	3 years

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DISTRIBUTION & CUSTOMER SERVICES

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Street Light Registers		CES	4 years
Street Light Reports		CES	4 years
Street Light Service Request		CES	6 years
Summary Of Credit Deposit Activity	R205SC	CES	6 years after refund
Sundries & Overcredits		CES	2 years
Sundry Debit/Credit	62-4196	CES	6 years
Sundry Sale Cleaned Jobs	R027SC	CES	5 years
Sundry Sale File Maintenance Verify Report	R016SC	CES	5 years
Sundry Sale Journal Entries To Revenue Account	R04DSC	CES	5 years
Sundry Sale Monthly Account Transaction	R041SC	CES	5 years
Sundry Sale Summary Balance Report		CES	5 years
Sundry Sales		CES	4 years
Survey Log Sheets		CES	2 years
Surveys - Service Installation		CES	Retain 6 years (i.e. customer service survey to determine type of service and equipment to be installed.)
Suspense Deposits		CES	3 years
Suspense Lit Report	R717CS	CES	2 years
Tampering Files		CES	6 years
Unassigned Closed Accounts	R006CS	CES	1 year after account is closed
Unpaid Balances Prior To Billing	R325CS	CES	3 years for accounts subject to cycle balance adjustments All others - 1 year

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DISTRIBUTION & CUSTOMER SERVICES

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
User Tax Reports		6 years R731cs - tax adjustment on customer refusing to pay tax R733cs - tax exempt open accounts R734cs - taxable closed accts submitted to collection agency R735cs - taxable accts transferred to write off R736cs - user tax adjustments	6 years
Z.I.P. Caps Check Regular & Report	R275CS	6 years	6 years
Z.I.P. Caps Report		6 years	6 years
Z.I.P. Certificate Of Performance	61-4659	6 years	3 years
Z.I.P. Check Vouchers & Supporting Detail		25 years	25 years
Z.I.P. Contract Short Form		5 years	5 years
Z.I.P. Financing Agreement	61-4682	5 years	5 years
Z.I.P. Financing Application	62-4003	5 years	5 years
Z.I.P. Financing Application (Audit Required)	62-4002	5 years	5 years
Z.I.P. Free Weatherization Waiver		5 years	5 years
Z.I.P. Inspection Report	62-3745	5 years	5 years
Z.I.P. Loan Guidelines Multi-Family Application.	62-3812	5 years	5 years

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OPERATIONS, MAINTENANCE & CONSTRUCTION

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Adequate Wiring Data		FERC 23C	3 years
Agreement - Riser		FERC 7	8 years after expiration or cancellation
Agreement General Natural Gas Extension & Service	62-4517	FERC 7	6 years after expiration or cancellation
Agreement Install/Removal Fac/Supply Electric Service	62-4513	FERC 7	6 years after expiration or cancellation
Annual Rept Pipeline/Mains Operating Over 20% Smys	75-352	S.P. 453-7	Life of Facility
Anode Record		FERC 23P	Life of Equipment
Apparatus Failure Reports		FERC 23F	Electric Transmission & Distribution - 6 years Gas Transmission & Distribution - 6 years
Application Clearance Load Transfers / Notices / Notification	62-3470	CES	6 years
Application For Clearance - Gas	62-3135	CES	6 years
Apprentice Filter Monthly Assignment Chart	61-4170	CES	1 year after employee completes apprentice program
As-Built Records Of Facilities		FERC 36A	Life of Facility
Cable Test Reports		CES	5 years
Calorimeter Recording Sheets		GSIS 459-2	3 years
Calorimeter Station Specifications		GSIS 459-2	3 years after calorimeter station has been permanently abandoned. (includes piping & design plans)
Cathodic Protection Report	62-4933	S.P. 412-1	Life of Facility
Cathodic Protection Station Report	62-4932	S.P. 412-1	Life of Facility
Certificate Of Inspection	62-5554	CES	6 years
Chart - Air Temperature		GSIS 459-2	3 years
Chart - Ammeter		FERC 23F	3 years
Chart - Annual Pressure Calibration		GSIS 459-3	3 years
Chart - B.T.U.		GSIS 459-2	3 years
Chart - Calibration Pressure Recorder		GSIP 457-2	6 years

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Chart - Calorimeter		GSIS 459-2	3 years
Chart - Calorimeter Water		GSIS 459-2	3 years
Chart - Compressor Discharge Pressure		S.P. 463-9	3 years
Chart - Continuous Sampler Fill Cycle Verification		GSIS 459-3	3 years
Chart - Distribution Flow		S.P. 463-9	3 years
Chart - Distribution Pressure		S.P. 463-9	3 years except for the five year period ending July 1, 1970, the documented chart with the highest operating pressure for each distribution system, or any other chart which is used to document the maop, shall be permanently retained.
Chart - District Valve Hi/Lo Pressure		S.P. 463-9	3 years
Chart - Division Regulation Pressure		S.P. 464-2	3 years
Chart - Flow Pressure		S.P. 463-9	3 years
Chart - Frequency		OM&C	3 years
Chart - Gas Usage		FERC 23K	3 years
Chart - Holder Pressure		FERC 23M	3 years
Chart - MAOP Pressure Verification (Dist. & Dfm)		S.P. 463-6	Life of facility
Chart - Miscellaneous Pressure		S.P. 463-9	3 years
Chart - No Gas		GSIP 457-1/LAW	4 years
Chart - Orifice Calibration		GSIP 457-2	Gas measuring equipment - 6 years
Chart - Pressure Gage		S.P. 463-9	3 years except for the five year period ending July 1, 1970, the documented chart with the highest operating pressure for each distribution system, or any other chart which is used to document the maop, shall be permanently retained.
Chart - Puffation		GSIP 457-2	1 year after puffation is corrected (Gas Measuring Equipment)

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Chart - Substation Weather/Voltage		GES	Retain summer and winter peak charts - 6 years Retain voltage charts - 6 years Retain all others - 3 years
Chart - Telemetry		S.P. 463-9	3 years
Chart - Temperature Calibration		GSIP 457-2	6 years
Chart - Transmission Line Pressure		FERC 23K	3 years
Chromatograph Printouts		S.P. 454.01-4	3 years
Circuit Breaker Overhaul Records		FERC 23P	Life of Equipment
Circuit Outage Records		FERC 23G	3 years
Clearance/Non-Tast/Notification Record	62-3469	GES	6 years
Clearances - Division Operator		GES	6 years
Compressor Operation And Reports		FERC 23L	Gas Transmission & Distribution - 3 years
Contracts		See Accounting & Corporate Records	
Correspondence - All Types		FERC 63A	Retain for the period prescribed for the item to which it relates where necessary to a proper explanation of same.
Commission Records		S.P. 412-1	Life of Facility
Crew Location Sheet		GES	2 years
Daily Gas Report		FERC 23K	3 years
Daily Load Curves		GES	6 years
Daily Operating Report		GES	6 years
Daily Patrol & Work Patrol Pipeline	62-4648	S.P. 460.2-1	Life of facility for numbered gas transmission lines 3 years for all others
Daily Summary Of Interruptions		FERC 23D	6 years
Displacement Meter Calculation Sheet	62-6266	S.P. 817-3	3 years
Distribution Interruption Or Transmissin Outage Report	62-6416	FERC 23D	6 years
District Regulator Data Sheet	62-6271	S.P. 464-2	5 years or for the life of the facility, whichever is less

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
District Regulator Station Maintenance Record	62-8321	S.P. 484-2	5 years or for the life of the facility, whichever is less.
Division Electric Service Report	62-4939	FERC 23C/23D	6 years
Division Operator Report		FERC 23C/23D	6 years
Electric Estimator Productivity Report		CES	3 years
Electric Meter Catalog (Microfiche)	R012FM	CES	Permanent
Electric Voltage Complaints		CES	3 years
Electric Voltage Tvi		CES	6 years
Emergency Curtailment Procedures		FERC 29B	Destroy at option after expiration of supersession.
Emergency Shutdown Procedures		FERC 29B	Destroy at option after expiration or supersession.
Engineering Records Drawings & Support Data		FERC 39A	Records pertinent to the constructed facility retain until superseded or 6 years after the facility is retired. If construction of facility does not result, destroy at option after a complete accounting of expenses incurred.
Exposed Main Patrol Books		CES	Life of Facility
Field Investigation For Electric Meters & Equipment	62-4061	CES	Permanent
Field Recorder Data Sheet	61-4212	CES	6 years
Field Test Of Curb Rotary Meters		FERC 23K	Until superseding test but not less than 2 years
Field Test Of Rotary Meters		FERC 23K	Until superseding test but not less than 2 years
Full Factory Memo		CES	4 years
Fumigation Leak Surveys, Logs & Records		S.P. 460.21-8	5 years
Gas Control Reports		FERC 23K	3 years
Gas Crew Productivity Report	62-3385	CES	1 year
Gas Dehydration Plant Inspection Report		GSIS 462-1	6 years
Gas Department Delineations		CES	3 years
Gas Displacement Meter Set Record	62-3097	S.P. 817-3	3 years

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Gas Drip Reports		FERC 23D	3 years
Gas Facility Leak Survey Progress Report - Weekly	75-439	GES	6 years
Gas High Pressure Test Record		FERC 23M	3 years
Gas Holder Inspection Records		S.P. 453-1	Permanent
Gas Inhibitor System Inspection Report	62-3096	GSIS 462-1	6 years
Gas Leakage Test Record Streets & Paved Ways	62-4836	GES	Life of Facility
Gas Measuring Records		FERC 23J	Gas Transmission & Distribution - 1 year
Gas Meter Multiplier Record	62-3620	S.P. 817-3	3 years
Gas Pressure Department Reports		FERC 23M	Gas Transmission & Distribution - 3 years
Gas Sample Tag	62-3805	GSIS 459-3	3 years
Gas Sample Tag - Record Copy	62-3806	GSIS 459-3	3 years
Gas Sample Tank - Maintenance & Testing		GSIS 459-3	3 years
Gas Service Department Daily Work Report	62-4688	GES	4 years
Gas Service Record	62-4183	GES	Life of Facility
Gravitometer Maintenance Record	61-4227	S.P. 454/01-3	3 years
Hazard Notice	62-3010	GES	6 years
High Voltage		FERC 23G	3 years
High Pressure Meter Sheet		FERC 23H	Retain for Life of Meter
History Records - Equipment		FERC 23P	Life of Equipment
History Records Pole / Tower / Equipment		FERC 23P	Electric Transmission & Distribution
Inspection Records - Leak Repair Or Pipe Exposure		S.P. 460.21-4	Retain for Life of Equipment
Inspection Reports Pressure / Welds		GES	Life of Facility

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Inspections - Company Facilities		IIPP S.P.	Inspection of company facility records shall include names of person(s) conducting inspections, unsafe conditions or work practices identified, and action taken to correct unsafe conditions or practices. Retain - 3 years.
Insulator Test Records		FERC 23I	Electric Distribution - 3 years
Insulator Test Records		CAISO TCA, Appendix C, 6.1	Electric Transmission - 5 years
Interruption Report - 12 Month Circuit		FERC 23D	Electric Transmission & Distribution - 6 years
Interruption Report - Service		FERC 23C	Gas Transmission & Distribution - 6 years
Interruption Reports		FERC 23D	Electric Transmission & Distribution - 6 years
Inventory - Hourly Gas Transmission		FERC 22B	6 years
Job Scheduling Input Document - Gas & Electric	62-3695	CES	Destroy at option
Label Caution Reconditioned (Delay Test Tag)	62-1274	CES	30 days
Leak And/Or Shut Down Inspection Report		S.P. 460.21-4	Life of Facility
Leak Or Test Failure Report	F7100.2	CES	Life of Facility
Leak Report - Distribution System	F7100.1	CES	Life of Facility
Leak Survey Inspection & Report	62-3117	S.P. 460.2-2	Life of Facility
Report Form A			
Line Inspection Reports		FERC 23G	Electric Distribution - 3 years
Line Inspection Reports		CAISO TCA, Appendix C, 6.1	Electric Transmission - 5 years
Line Inspection Reports		FERC 23D	Gas Transmission & Distribution - 3 years
Line Patrol Reports		FERC 23G/LAW	Electric Distribution - 3 years
Line Patrol Reports		CAISO TCA, Appendix C, 6.1	Electric Transmission - 5 years
Line Patrol Reports		S.P. 460.2-1	Life of facility for numbered gas transmission lines 3 years for all others

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Line Trouble Reports & Records		FERC 23G	Electric Distribution - 3 years
Line Trouble Reports & Records		CAISO TCA, Appendix C, 6.1	Electric Transmission - 5 years
Liquid Removal Records	62-3581	GSIS 462-1	6 years
Load Management Record		CES	6 years
Load Reports		CES	6 years
Logs - Curtailment Order		FERC 23C	Gas Transmission & Distribution - 6 years
Logs - Curtailment Order		FERC 23D	Electric Transmission & Distribution - 6 years
Logs - Division Operator		FERC 23C	Gas Transmission & Distribution - 6 years
Logs - Electric Dispatch		FERC 23D	6 years
Logs - Equipment		FERC 23C	Electric Distribution - 3 years
Logs - Equipment		CAISO TCA, Appendix C, 6.1	Electric Transmission - 5 years
Logs - Estimator Weekly Time		CES	6 years
Logs - Evaporator		CES	3 years
Logs - Furnigation		S.P. 460.21-8	5 years
Logs - Gas Dispatch		FERC 23C	6 years
Logs - Inspection		CES	Permanent
SPCC Compliance			
Logs - Interruption		FERC 23D	Electric Transmission & Distribution - 6 years
Logs - Leak Survey	62-3103	S.P. 460.21-4	Transmission Mains - Life of section of main plus 6 years All others - current and immediately previous survey
Logs - Operating		CES	6 years
Logs - Regulator		FERC 23P	Life of Equipment
Logs - Service Interruption		FERC 23C	Gas Transmission & Distribution - 6 years
Logs - Serviceman		CES	6 years
Logs - Storage Battery		FERC 23C	Electric Distribution - 3 years
Logs - Storage Battery		CAISO TCA, Appendix C, 6.1	Electric Transmission - 5 years
Logs - Street Light		CES	4 years

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Logs - Substation		FERC 23A	Electric Distribution - 3 years
Logs - Substation		CAISO TCA, Appendix C, 6.1	Electric Transmission - 5 years
Logs - Switchboard		CES	6 years
Logs - System Operator Daily		FERC 23B	Electric Transmission & Distribution - 3 years
Logs - T&D Dept Load Dispatch/Operating		FERC 23B	Gas Transmission & Distribution - 3 years
Logs - Transmission Line		FERC 23A	Electric Distribution - 3 years
Logs - Transmission Line		CAISO TCA, Appendix C, 6.1	Gas Transmission & Distribution - 3 years
Logs - Transmission Line		FERC 36A	Electric Transmission - 5 years
Manhole Prints		FERC 36A	Life of Facility
Memo Of Shut-In-Wells		GSIP 457-1	4 years
Meter Constant Or Gas Multiplier Report	62-3643	S.P. 817-3	3 years
Meter History Records		FERC 23H/23M	Retain for life of meter
Meter Shop Reports		FERC 23I	Gas Transmission & Distribution - 3 years
Meter Shop Reports		FERC 23L	(monthly reports, summarizing tests, repairs, etc.)
Meter Shop Reports		CAISO TCA, Appendix C, 6.1	Electric Distribution - 3 years
Meter Test Records		FERC 23M	Electric Transmission - 5 years
Monthly Odorization Report	62-4850	GSIS 465-1	Gas production - 1 year after meter is retired
Monthly Report Of Process Chromatograph	74-494	S.P. 454.01-4	Gas T&D - 1 year after meter is retired
Monthly Report Recording Calorimeter Accuracy	62-4896	S.P. 454.01-2	Electric T&D - 1 year after meter is retired
Motor Burnout Data Sheet	62-6423	CES	1 year
			Maintenance and Calibration
			3 years (Includes calibration tests)
			Until Equipment is Retired

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Neutral Current Correspondence & Measurements		CES	Permanent
Odor Intensity Report Percent Gas In Air	62-3480	GSIS 485-1	1 year
Orifice Meter Change Record	62-6391	GSIP 457-1	4 years
Orifice Meter Inspection Report	62-4898	GSIP 457-2	1 year after meter is removed from service
Orifice Meter Record Card	62-3910	GSIP 457-2	1 year after meter is removed from service
Orifice Meter Record Periodic Inspection	62-3949	GSIP 457-2	1 year after meter is removed from service
Orifice Plate Inventory Card	62-3563	GSIP 457-4	1 year after removed from service
Orifice Plate Record Card	75-113	GSIP 457-4	1 year after removed from service
Outage Report Supplemental Data Form	62-4922	FERC 23D	6 years
Outage Reports		FERC 23D	6 years
Paving Records		CES	6 years
Plastic Joint Qualification Test Report	62-3235	CES	6 years
Pole And Anchor Complaint Records		FERC 23P	6 years
Pole Inspection Records		FERC 23P	Retain until superseded or pole is retired
Record Of General Inspection & Operating Tests		FERC 23D	Gas Transmission & Distribution - 3 years
Regulator History Records		FERC 23P	Life of Equipment
Relay History Records		FERC 23P	Life of Equipment
Repair Tags - Gas Main		CES	Life of Facility
Report Of AC-ME Gravimeter Test Calibration & Maintenance	61-4228	S.P. 454.01-3	3 years
Request For Location Of Utility Facilities	62-3082	S.P. 403.2	5 years

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Routine Maintenance Completion Report	62-3423	CES	6 years
Routine Maintenance Street Light Discrepancy Sheet	62-3789	CES	6 years
Storage Battery Record		FERC 23C	3 years
Storm & Lightning Data		FERC 23H	Electric Transmission & Distribution - 6 years
Street Opening Inspection Reports		FERC 23E/23J	Electric Transmission & Distribution - 6 years Gas Transmission & Distribution - 6 years
Street Opening Repair Reports		FERC 23E/23J	Electric Transmission & Distribution - 6 years Gas Transmission & Distribution - 6 years
Street Repair Records		FERC 23E/23J	Electric Transmission & Distribution - 6 years Gas Transmission & Distribution - 6 years
Substation Apparatus & Wiring Data		FERC 36	Life of Equipment
Substation Diagrams		FERC 36	Life of Facility
Substation Equipment Test Reports		FERC 23E	Electric Distribution - 3 years
Substation Equipment Test Reports		CAISO TCA, Appendix C, 6.1	Electric Transmission - 5 years
Substation General Inspection Reports		FERC 23 E	Electric Distribution - 3 years
Substation General Inspection Reports		CAISO TCA, Appendix C, 6.1	Electric Transmission - 5 years
Substation Half-Hour Sheets		FERC 23B	3 years
Substation History Books		FERC 23P	Life of Equipment
Substation Load & Performance Record		FERC 23B	3 years
Substation Load Reports		FERC 23B	3 years
Substation Meter Readings		FERC 23B	3 years
Substation Operation Tests		FERC 23E	3 years
Substation Report & Inspection Sheet	62-6318	CES	6 years

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Substation Reports Of Operation System Operator Reports Of Operation		FERC 23D FERC 23B	6 years Electric Transmission & Distribution - 3 years
Tag - Caution Do Not Operate This Equipment	62-1256	OMC	Discard when no longer in use
Tag - Information	62-1255	OMC	Discard when no longer in use
Tag - Man On Line	62-1225	OMC	Discard when no longer in use
Tag - Switching	62-4118	OMC	Discard when no longer in use
Tag - Warning Non-Test Tag	62-1224	OMC	Discard when no longer in use
Test Instrument Calibration Record	61-6862	S.P. 570.22	3 years after retirement of equipment
Test Instrument Calibration Record - Manometer	61-6862	S.P. 570.24	2 years after retirement of equipment
Test Instrument Calibration Record - Thermometer	61-6862	S.P. 570.24	4 years after retirement of equipment
Transformer Available Reports		FERC 23N	Retain for life of transformer
Transformer History Records		FERC 23N	Electric Transmission & Distribution Retain for life of transformer
Transformer Meter Catalog (Microfiche)	R011FM	FERC 23N	Retain for life of transformer
Transformer Rated Elec Meter & Associated Equipment Order	62-3318	FERC 4DA	6 years
Transmission Line Operating Reports		FERC 23K	Gas Transmission & Distribution - 3 years
Trouble Report		CES	6 years
Troubleshooters Report	62-4621	CES	6 years
Valve Maintenance Records		FERC 23P	Life of Equipment
Vault & Pad Prints		FERC 35A	Life of Facility
Voltage Complaint File		CES	6 years
Weekly Calorimeter Test Reports		CES	3 years
Weekly Peak Load Reports		CES	6 years

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RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
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ELECTRIC SUPPLY

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
As-Built Records Of Facilities			Life of Facility
Boiler Room Reports - Equipment In Service		FERC 36A FERC 22.1B	Electric Production - 3 years
Boiler Room Reports - Equipment Performance		FERC 22.1B	Electric Production - 3 years
Boiler Tube Failure Reports		FERC 22.1C	Electric Production - 3 years
Chart - Precipitation		FERC 21.1I	Electric Production - Retain 2 years - except river flow data collected in connection with hydro operation shall be retained for life of corporation.
Chart - Seal Pump		FERC 22.1A	3 years
Chart - Water Level Recorder		FERC 21.1I	Electric Production - Retain 2 years - except river flow data collected in connection with hydro operation shall be retained for life of corporation.
Contracts			See Accounting & Corporate Records
Correspondence - All Types		FERC 63A	Retain for the period prescribed for the item to which it relates where necessary to a proper explanation of same.
Emergency Curtailment Procedures		FERC 29B	Destroy at option after expiration or supersession
Emergency Shutdown Procedures		FERC 29B	Destroy at option after expiration or supersession
Engineering Records Drawings & Support Data		FERC 36A	Records pertinent to the constructed facility retain until superseded or 6 years after the facility is retired. If construction of facility does not result, destroy at option after a complete accounting of expenses incurred.
Fuel Oil Reports		FERC 22.1G	3 years
Gage Reading Reports		FERC 22.1I	Electric Production - Retain 2 years - except river flow data collected in connection with hydro operation shall be retained for life of corporation.
Generation Reports		FERC 22.1F	Electric Production - 3 years
High Tension Load		FERC 22.1F	Electric Production - 3 years
Generation Reports - Station		FERC 22.1E	Electric Production - 25 years
Generation Reports - System		FERC 22.1E	Electric Production - 25 years
History Records - Equipment		FERC 23F	Life of Equipment
Load Curves		FERC 22.1H	Electric Production - 3 years
Logs - Boiler Room		FERC 22.1A	Electric Production - 3 years Retention includes supporting data.

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ELECTRIC SUPPLY

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Logs - Coat		FERC 22.1H	Electric Production - 3 years
Logs - Coke & Oil Reports		FERC 22.1G	3 years
Logs - Condenser Room		FERC 22.1A	Electric Production - 3 years Retention includes supporting data.
Logs - Feed Pumps		FERC 22.1A	3 years
Logs - Generation & Output		FERC 22.1D	Electric Production - 6 years Retention includes supporting data.
Logs - Pump Room		FERC 22.1A	Electric Production - 3 years Retention includes supporting data.
Logs - Residual Reports		FERC 22E	3 years
Logs - Station		FERC 22.1D	6 years
Logs - Temperature		FERC 22.1H	Electric Production - 3 years
Logs - Turbine Room		FERC 22.1A	Electric Production - 3 years Retention includes supporting data.
Logs - Water		FERC 22.1H	Electric Production - 3 years
Oil & Waste Reports		FERC 22.1G	Electric Production - 3 years
Permits - Load Dispatcher & Station		FERC 22.1K	Electric Production - retain 1 year, except where the basic chart information is transferred to another record, the charts need only be retained 6 months provided the record containing the basic data is retained one year.
Pump Tests		Electric Supply	6 years
Routine Maintenance Completion Report	62-3423	Electric Supply	6 years
Tag - Caution Do Not Operate This Equipment	82-1256	Electric Supply	30 days
Tag - Information	62-1255	Electric Supply	30 days
Tag - Man On Line	62-1225	Electric Supply	30 days
Tag - Switching	82-4118	Electric Supply	30 days
Tag - Warning Non-Test Tag	62-1224	Electric Supply	30 days
Thermal Efficiency Tests		FERC 22J	3 years
Turbine Meter Spin Test Report		FERC 23K	Until superseded but not less than 2 years
Turbine Room Reports Equipment In Service		FERC 22.1B	Electric Production - 3 years

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ELECTRIC SUPPLY

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Turbine Room Reports Equipment Performance		FERC 22.1B	Electric Production - 3 years Retention includes related documents.

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GAS SUPPLY

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Analysis Gas Produced & Purchased		FERC 221	Gas Production - 6 years (including btu & sulfur content)
As-Built Records Of Facilities		FERC 36A	Life of Facility
Chart - Gas Purchase		GSP 457-1	4 years
Contracts			See Accounting & Corporate Records
Correspondence - All Types		FERC 63A	Retain for the period prescribed for the item to which it relates where necessary to a proper explanation of same.
Emergency Curtailment Procedures		FERC 29B	Destroy at option after expiration or supersession
Emergency Shutdown Procedures		FERC 29B	Destroy at option after expiration or supersession
Engineering Records Drawings & Support Data		FERC 36A	Records pertinent to the constructed facility retain until superseded or 6 years after the facility is retired.
Gas Measuring Records		FERC 22N	If construction of facility does not result, destroy at option after a complete accounting of expenses incurred.
Gas Produced & Purchased Records		FERC 22H	Gas Production - retain 1 year, except where basic chart information is transferred to another record, the charts need only be retained 6 months provided the record containing the basic data is retained one year.
Gas Sent Out And Holder Stock Records		FERC 22H	Gas Production - 8 years
Gas Well Test Report	61-6084		Gas Production - 6 years
Logs - Boiler		GSP 459-1	3 years after the gas well is abandoned
Logs - Gas Generation & Output		FERC 22A	Gas Production - 3 years
Logs - Gas Machine		FERC 22B	Retention includes related documents
Logs - Temperature & Atmospheric Pressure		FERC 22A	Gas Production - 6 years
Maps - Underground Storage Of Natural Gas		FERC 22C	Retention includes related documents
Meter Test Records		FERC 23.1C	Gas Production - 3 years
		FERC 23M	1 year after reservoir, field, or relevant storage area is abandoned.
			Gas Production - 1 year after meter is retired

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GAS SUPPLY

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
Record Of General Inspection & Operating Tests		FERC 22J	Gas Production - 3 years
Report Of Coal/Coker/Oil		FERC 22D	Gas Production - 3 years
Residual Report		FERC 22E	Gas Production - 3 years
Routine Maintenance Completion Report	62-3423	Gas Supply	6 years
Test Of Heating Value At Stations & Outlying Points		FERC 22G	Gas Production - 6 years
Weekly Report Heating Value & Specific Gravity	62-3903	FERC 22J	3 years
Well Records - Gas Production		FERC 22K	Retain one year after field or relevant production area is abandoned. (including clearing, bailing, shooting, etc., records; rock pressures; open flow; production; gas analysis reports, etc.)
Well Records - Underground Storage Of Natural Gas		FERC 23-1A	Well records, reports and logs which includes data relating to pressures, injected volumes, withdrawn volumes, core analysis, daily volumes of gas injected into and withdrawn from reservoir, and cushion and working gas volumes for each reservoir. Retain 1 year after reservoir, field, or relevant storage area is abandoned.

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NUCLEAR POWER GENERATION

RECORD TITLE	FORM NUMBER	RETENTION JUSTIFICATION	RETENTION PERIOD
All Nuclear Records		Nuclear Power Generation	Nuclear records shall be processed in accordance with regulatory requirements as well as Nuclear Power Generation's program directives.

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