**GENERAL SCHEDULE**

**REQUEST FOR NEW RECORD SERIES (RM84)**

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| **SEND COMPLETED FORM TO:** SOS/RIM 1320 BOZEMAN ST, HELENA MT 59601 or email to [SOSRECORDS@MT.GOV](mailto:SOSRECORDS@MT.GOV) | | | | |
| From: | | Name: | | |
|  | | Agency/Dept.: | | |
| Address: | | |
| Phone: | | |
| E-mail address: | | |
| **INSTRUCTIONS:** | | | | |
| Use this form to request an addition to the States General Schedule. Submit the signed original and keep a copy for your file. The proposed addition will be submitted to the States Record Committee (SRC) for approval. You will be notified of the committee action. | | | | |
| 1. | **Records Category-under General Records Retention Schedule**  Mark the Category the new record series belongs under.  GS1 SABHRS Financials  GS2 General Financial  GS3 Administrative and Legal  GS4 Purchasing & Procurement  GS5 Payroll & Personnel  GS6 Technology Services  GS7 Records Management  GS8 Licensing  GS9 Non-Record Materials  New | | | |
|  | **Record Series Title:** | | | |
| 2. | **Description of the Record Series:**  ► **Type of files:** subject, requests, medical, correspondence, financial, personnel, major forms, etc. | | | |
| ► **Forma**t: original paper, computer tape, microfilm, photos, maps, duplicates, electronic images, etc. | | | |
| ► **Content:** directives, licenses, applications, reports, requisitions, publications, etc. | | | |
| **► Function:** why record series exists; purpose it serves end use | | | |
| 3. | **PROPOSED RETENTION TIME:** | | | |
|  | List the recommended retention of the record series in years, segregated by location (in office or storage) and totaled. Records with “Permanent Retention” may be offered to the State Historical Society Archives after the period stipulated in this total. Any special conditions should be noted (“after audit”, “after case closure”).  **►Office (in years):**    **►Storage (in years):**    **►Total (in years):** | | | |
| 4. | DISTRIBUTION: | | | |
|  | List who owns these records. Example: Agency, State Accounting etc. | | | |
| 5. | **DISPOSITION:** Check more than one box if required. | | | |
|  | Agency Archives  Incinerate  Offer to State Library  Delete  Microfilm & Destroy  Shred as Classified  Image & Destroy  Microfilm & Retain  Toss without Restriction  Image & Retain  Offer to State Archives  Other: Please Explain | | | |
| 6. | **COMMENTS:** | | | |
|  | | | |
| **This request for addition to the General Schedule was reviewed by the following members of the States Records Committee:** | | | | |
| SRC Member | | | Approved | Disapproved –list why under comments |
| Secretary of State: | | |  |  |
| Legislative Audit: | | |  |  |
| Historical Society: | | |  |  |
| Department of Administration: | | |  |  |
| Attorney General: | | |  |  |
| **Comments (why disapproved):** | | | | |

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| 7. | **Approved new Record Series:** |
|  | ►Series Name:  ►Schedule Number:  ►Item Number: |
| 8. | Once approved the office of the Secretary of State, Records and Information Management will add the new record series to the general schedule, than add onto the index and will then post the new schedule to the Secretary of States Web page. |