

- **Entity, Contact, Address, Phone #, and E-mail:** Fill out all of these fields at the top of the form. The DISPOSAL REQUEST NUMBER is optional. Most offices use a year + number of request, i.e., 2010-01.
- **Schedule #:** Record the Retention Schedule # that applies to your entity and/or record type. Schedules are towards the bottom of the Local Record Forms and Retention Schedules web page.

**Note:** If your entity type does not have its own schedule, the record type may be listed in the General Schedule (1). If you are associated with a municipality or county, you can search their schedules for your record types. If your records are unique to your local government, contact a member of the Local Government Records Committee (<http://sos.mt.gov/Records/Committees/local.asp>) about creating your own schedule or adding these records to another schedule, if applicable.

- **Item #:** Record the Item # located to the left of the Record Title and Description on the Retention Schedule. Also include the letter(s) if applicable (i.e., item 5a).
- **Page #:** If using the **Municipal (#8)** or **School District (#7)** schedules, please fill in each item numbers' corresponding page number due to the fact that the same item numbers are used multiple times in these schedules. This field is optional for all other schedules.
- **Description of Records:** Go to the appropriate Retention Schedule and use the RECORD TITLE AND DESCRIPTION from the schedule that best fits your record.

**Notes:**

- **Wording Applicable to Your Office:** You can add your office's description of the record, after the schedule's description, if desired.
- **Request for Change in Records Schedule Form:** If you cannot find an appropriate RECORD TITLE AND DESCRIPTION within your Retention Schedule(s) that match your record type, you may need to fill out a *Request for Change in Records Schedule* form, located above the *Request for Records Disposal or Transfer Authorization* form.
- **Multiple Boxes** - If you have multiple boxes of records with the same record title and description, you may use just one line on the form that encompasses all of the boxes' inclusive dates.
- **Inclusive Dates:** Include the dates for the records being disposed. Use the full date if possible. If not, the month and year will suffice; or if you can only provide the year, note on the form if it pertains to the fiscal year or calendar year.
- **Confidential:** You must indicate whether the record is confidential with an "X". Confidential records are not posted to the List Manager and should be destroyed by shredding.
- **10 Year Rule:** Use an "X" to indicate if your records are 10 years old or older.
- **Dispose – Yes or No:** Leave blank. For Local Government Committee use, only.
- **Agency Comments:** Use this section to record pertinent information regarding your records (i.e., microfilmed, duplicate copy, record copy, transferred, etc.)
- **Audit History or Committee Comments:** Leave blank. For Local Government Committee use, only. Note: For records whose retention period is dependent on an audit (e.g., audit + 7yrs), retention years (e.g., audit + 7yrs) begin the month that the local government's **final** fiscal year audit report is received from the independent auditor.
- **Signatures:** At least two different signatures must be obtained before sending your disposal request to the Committee for approval: a member of the governing body (i.e., Mayor, County Commissioner, Judge, Director, Trustee, etc.), the records custodian and/or the clerk.

If you have any questions while filling out the form, call or e-mail Beth Riitano at (406) 444-9135 or [Britano@mt.gov](mailto:Britano@mt.gov), or, if unavailable, another member of the Local Government Records Committee.

1. Send your completed form, by email, to [SOSLocalGovtRecCom@mt.gov](mailto:SOSLocalGovtRecCom@mt.gov); or mail to:

Local Government Services Bureau  
 Attn: Beth Riitano  
 P.O. Box 200547  
 Helena MT 59620-0547

Once approved by the Local Government Services Bureau, the Montana Historical Society, and a Local Government employed committee member, the form will be returned to you. You may then dispose of approved items ***that are not 10 years old or older.***

2. The Montana Historical Society will forward requests with items that are 10 years or older to the Secretary of State Records & Information Management (RIM) Division to post on the Local Government Records list-serve for the 60-day notice period. Once posted, the RIM Division will forward the disposal request back to you. You must hold these records for 60 days. If you are contacted during the 60-day period, you must transfer the record(s) to the requesting party in the priority order shown in MCA 2-6-1205. The Local Government Records Committee recommends that each local government agency adopt a policy to manage multiple requests for the same record(s). The requesting party is required to pay all costs associated with the transfer. If no one has requested your records after the 60-day period is up, you may dispose of them.

Once you have transferred or disposed of the approved items, sign the CERTIFICATE OF DESTRUCTION located on the signature page of the *Request for Records Disposal or Transfer Authorization* form. Keep the original in your office.