

**STATE OF MONTANA
SECRETARY OF STATE
RECORDS AND INFORMATION MANAGEMENT (RIM)
GENERAL RECORDS RETENTION SCHEDULE**

Records Category < Purchasing/Procurement

General
Schedule Number < GS4

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Revision Date: December 2015

Item	Record Series Title	Distribution	Office Storage (in years)	Records Center (in years)	Total Retention (in years)	Disposition Method T/S/D Toss, Shred, Delete
1	Solicitations/Requisitions-negotiable/non-negotiable IFB/RFP/RFQ/RFI/Limited Solicitations	State Procurement	1	3	4 after completion of solicitation	No RM5 Required Toss
		Agency	1	3	4 after completion of solicitation	No RM5 Required Toss
2	Purchase Orders/Sole Source-Adjustments Contracts: Term/Vendor/Sole Source-Amendments All Supporting Documentation	State Procurement	Until Expires	8	8 after expired	No RM5 Required Toss
		Agency	2	6	8 after expired	No RM5 Required Toss
3	Contract Security - negotiable/non-negotiable	State Procurement	Until contract or security expires	7	8 after contract expired	No RM5 Required Shred
		Agency	2 after contract expired	6	8 after contract expired	No RM5 Required Shred

The State Records Committee (SRC) has designated all records marked as “No RM5 Required” **will not require approval from the SRC prior to destruction.**

If the ‘Disposition’ above lists “**Offer to State Archives**” **you must** contact the Historical Society at 444-7427 or ASparks@mt.gov before disposing.

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4	Proof of Insurance Documentation	State Procurement	Contract or insurance expiration	0	Contract or insurance expiration	No RM5 Required Toss
		Agency	Contract or insurance expiration	0	Contract or insurance expiration	No RM5 Required Toss
5	Newsletters	State Procurement	4	0	4	Offer to Archives RM5 Required
6	Procurement Reports	State Procurement	4	0	4	No RM5 Required Toss or Delete
		Agency	2	2	4	No RM5 Required Toss or Delete
7	Protest of Awarded Contract	State Procurement	4	0	4 after resolved	No RM5 Required Shred
		Agency	4	0	4 after resolved	No RM5 Required.

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8	Contracts-Procurement	State Procurement Agency	See item 2	0	See item 2	See item 2
9	Requisitions	State Procurement Agency	See item 1 above	0	See item 1 above	See item 1 above
10	MT Residents Preference Affidavit	State Procurement	30	0	30	RM5 Required

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