

STATE OF MONTANA SECRETARY OF STATE RECORDS AND INFORMATION MANAGEMENT (RIM) GENERAL RECORDS RETENTION SCHEDULE	Records Category RECORDS & INFORMATION MANAGEMENT
	General Schedule Number 7
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Item	Record Series Title	Distribution	Office (In years)	Records Center (In years)	Total (In years)	Disposition (T/S/D)Toss/Shred/Delete
1	Justification to Acquire Major Office Equipment (RM17)	SOS RIM Agency	4 years 1 year	0 years 0 years	4 years 1 year	T/S/D No RM5 Required T/S/D No RM5 Required
2	Records Disposal Exception Report (RM6)	SOS RIM Agency	30 years 30 years	0 years 0 years	30 years 30 years	T/S/D RM5 Required Offer to State Archives T/S/D RM5 Required
3	Records Disposal Request (RM5) RM6 or Agency Form	SOS RIM Agency	30 years 30 years	0 years 0 years	30 years 30 years	T/S/D RM5 Required Offer to State Archives T/S/D RM5 Required
4	Records Disposal Request Continuation Sheet (RM5.1)	SOS RIM Agency	30 years 30 years	0 years 0 years	30 years 30 years	T/S/D RM5 Required Offer to State Archives T/S/D RM5 Required
5	Records Rolling Disposal Request (RM7) RM7 or Agency Form	SOS RIM Agency	30 years 30 years	0 years 0 years	30 years 30 years	T/S/D RM5 Required Offer to State Archives T/S/D RM5 Required
6	Records Inventory Worksheet (RM8)	Agency	1 year	0 years	1 year	T/S/D No RM5 Required
7	General Schedules Records Retention Schedule (RM3)	SOS RIM Agency	30 years 30 years	0 years 0 years	30 years 30 years	Delete No RM5 Required T/S/D No RM5 Required

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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SECRETARY OF STATE
RECORDS AND INFORMATION MANAGEMENT (RIM)
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8	General Schedule Records Series Profiles (RM1)	SOS RIM Agency	2 years Until Superseded	28 years 0 years	30 years Until Superseded	T/S/D No RM5 required T/S/D No RM5 required
9	Transmittal of Records (RM2)	SOS RIM Agency	Until Superseded Until Superseded	0 years 0 years	Until Superseded or all boxes destroyed Until Superseded or all boxes destroyed	T/S/D No RM5 required T/S/D No RM5 required
10	Records Center Requests (RM11)	SOS RIM Agency	2 years 1 year	3 years 3 years	5 years 4 years	T/S/D No RM5 Required T/S/D No RM5 Required
11	Migration Plan	SOS RIM Agency	2 years Until Superseded	28 years 0 years	30 years Until Superseded	RM5 Required Offer to State Archives T/S/D T/S/D No RM5 Required

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