

Montana Local Government Retention Schedule  
**REQUEST FOR CHANGE IN RECORDS SCHEDULE**  
INSTRUCTIONS

Use this form to request a change in a **Records Retention Schedule** governing the records of your agency. **Be specific** when filling out the form. If enough detail isn't available the form will be returned to you for completion and will require a separate submittal for review at the next scheduled committee meeting.

**Page One**

Fill in the Schedule Number that will be affected by this change request.

Fill in the Agency Name and Department Name that is requesting the change.

Row 1: Put an **X** in front of the change you are requesting. Enter the Page # and Item #.

Row 2: Declare the Records Series' title. If the series is called by multiple names, include all of the titles.

Row 3: Provide a functional description as to why the series exists or for what process is performed, what purpose it serves, for whom, etc.

Provide the content description based on the types of records normally produced to perform the function. For example, correspondence, applications, financials, etc.

Row 4: Describe what changes, additions or deletions you are requesting and for what reason.

Row 5: Be specific about how long the records must be kept before being eligible for destruction or historic transfer.

Explain what criteria is used to determine the retention time.

Row 6: List, by type and number, which state or federal regulations apply to the retention of the records series.

Row 7: Add any comments that may be relevant to this retention schedule change (additional space provided on page 2).

Row 8: Mark the box, that fits whether a review of or agreement has been reached for change(s) suggested. Provide explanation that fits the box that is marked.

Complete the Requested by: portion of the form prior to sending it to the Local Government Records Committee.

**Page 2**

Complete page 2, providing the detail related to who has had an opportunity to review and recommend the change(s).

Fill in the Schedule Number (same as on page 1). Add in the entity name that has reviewed or agreed on the change(s) suggested. Include the date of review and agreement. List the individuals who have review or agreed.

Add any comments that may be relevant to this retention schedule change.

Submit the signed original, and keep a copy for your file.

Mail to: **Local Government Records Committee**  
Montana State Archives - State Archivist  
225 N Roberts St  
PO Box 201201  
Helena MT 59620-1201

The proposed change will be submitted to the Local Government Records Committee for its next bi-annual meeting, regularly held on the 3<sup>rd</sup> Thursday in **April** or **October**. You will be notified of the committee action shortly thereafter.