**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  |
| 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. |