General Schedule Request for New Record Series (RM84) Instructions

**General Instructions**

Use Form RM84 to request a new record series to be added onto the General Schedule.

Send completed form to: SOS/RIM 1320 Bozeman Street, Helena MT 59601

Retain a copy for reference. Any questions should be directed to RIM at 406-444-9003 or 444-9009.

Complete whom this is **From Section**: Name, Agency/Dept., Address, Phone Number, and E-mail

**Instructions for Specific Entries**

**Entry 1** Records *Category-under the General Retention Schedule:* Mark the correct Schedule Number that matches your record series.

**Entry 2** Description *of the Record Series:* **Clearly describe the record series**. Complete each section listed.

* Type of Files: subject, requests, medical, correspondence, financial, personnel, major forms, etc.
* Format: original paper, electronic images, etc.
* Content: directives, licenses, applications, reports, requisitions, publications, etc.
* Function: why does this series exists, the purpose it serves and end use.

**Entry 3** Proposed *Retention Time for series.* List the recommended retention of the record series in years, segregated by location (in office or storage) and total. Records with “Permanent Retention” should normally be requested to be offered to the State Historical Society Archives. Note any special conditions.

* Office (in years)
* Storage (in years)
* Total (in years) unless permanent than list as “permanent”.

**Entry 4** *Distribution,* list who owns these records. Example: Agency-State Accounting etc.

**Entry 5** *Disposition,* check the box that applies.

|  |  |
| --- | --- |
| * Agency Archives
 | * Offer to State Archives
 |
| * Delete
 | * Offer to State Library
 |
| * Image & Destroy
 | * Shred as Classified
 |
| * Image & Retain
 | * Toss without Restriction
 |
|  | * Other: Please Explain
 |
|  |  |

**Entry 6** *Comments-*add in this space any comments that might help explain your records series.

**Entry 7, 8 and 9** *are completed by the States Records Committee Members.*