**GENERAL SCHEDULE**

**REQUEST FOR CHANGE TO A RECORD SERIES (RM85)**

|  |
| --- |
| **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 a change 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       |
| 2. | **Record Series Title:**       |
|  | **Description of the Record Series:** |
|       |
| 3. | **PROPOSED CHANGE IN 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 a change is 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 ON WHY CHANGE IS BEING REQUESTED:** |
|  |
| **7. This request for change 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):**  |

|  |  |
| --- | --- |
| 8. | Once approved the office of the Secretary of State, Records and Information Management will make the change to the general schedule, than add onto the index and will then post the updated schedule to the Secretary of States Web page. |