

Schedule No. **2**

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**County Clerk &  
Recorder**

**Adopted by the Local Government  
Records Committee, Sept. 1996  
Last Revised: April 2017**

MONTANA LOCAL GOVERNMENT RETENTION AND DISPOSITION SCHEDULE

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**CR 2**

\*RM60 is a records disposal request form issued by the Local Government Records Committee. "No RM60 required" means that the records do not need to be submitted to the LGRC disposal subcommittee for approval before being disposed unless the records are over 10 years old.

\* **Final report received by County Commissioners** **FOR RECORD DISPOSAL SEE MCA 2-6-403**  
**SEE MCA 7-4-2635 FOR RECORD PRESERVATION** (Budgetary Accounting and Reporting System fund code # 2393)  
Last Revised: 04-2017

## Before You Shred, Think Ahead

### Introduction to Public Records Management

All public records have a specific value—whether administrative, fiscal, legal, historical, transitory (short-term) and whether created internally or received from an outside source. Some of them are so vital to government operation, that they must be preserved for perpetuity or protected to ensure continuity. Every local government entity is legally required to manage its public records in an orderly and systematic way.

### Disposition & Destruction of Public Records

There are two different legal procedures that must be followed before it disposes of its public records. The first relates to records under ten years old. The second process relates to documents exceeding the ten-year retention limit.

- **Records Under Ten Years:** *Montana Local Government General Schedules* dictate how long a record must be kept before destruction or transfer. Before any action is taken, the agency must complete the *Request for Records Disposal or Transfer Authorization* form and submit it to the Montana Department of Administration, Local Government Services Bureau, P.O. Box 200547, Helena, MT 59620-0547. A template disposal form is located at [Request for Records Disposal](#). [Instructions](#) for completing the form are also available.

Once approved by the Local Government Services Bureau and the Montana Historical Society, the form will be returned to you. You may then dispose of approved items ***that are not ten years old or older***. Complete and file the form after adding destruction completion signature and date.

- **Records Over Ten Years:** If there are records older than 10 years the process changes because by [Law 2-6-1205, MCA](#) non-confidential records must be held for 60 days before they are destroyed. The 60-day notice alerts entities like Montana Historical Society-State Archives, colleges/universities, historical museums, genealogy societies, and the general public who may want to obtain those documents.

To activate the 60 day notice complete the *Request for Records Disposal or Transfer Authorization* [form](#) and submit it to the Local Government Services Bureau. The Bureau then sends it to the Montana Historical Society who will forward the Request to the Secretary of State Records & Information Management (RIM) Division. The items will be posted on the Local Government Records list-serve for the 60-day notice period.

If you are contacted during the 60-day period, it must transfer the record(s) to the requesting party in the priority order shown in MCA 2-6-1205. The requesting party is required to pay all costs associated with the transfer. If no one has requested the records

after the 60-day period, they can be destroyed or deleted and the Request should be signed off by the person conducting final removal.

The Local Government Records Committee recommends that each local government agency adopt a policy to manage multiple requests for the same record(s).

### **Technical Assistance**

**All requests for technical assistance should be emailed to [SOSLocalGovtRecCom@mt.gov](mailto:SOSLocalGovtRecCom@mt.gov).**

1. 9-1-1 MISCELLANEOUS RECORDS & SAFETY SUPPORT SYSTEM: Records filed with the Clerk and Recorder. 9-1-1 has a separate retention schedule for records kept in their office.	Filed.	Permanent
2. ABSTRACTS: See Mortgages		
3. AFFIDAVITS TO CERTIFICATES OF SURVEY OR PLATS: A document that shows changes or corrections to a plat or certificate of survey.	Filed. May microfilm for security and research.	Permanent
4. AFFIDAVITS OF PUBLICATION: Proof of Publication		2 years <b>NO RM60* REQUIRED</b>
5. AGRICULTURAL CLASSIFICATION APPLICATIONS		Permanent
6. ANNEXATION: a. Petition- Contains signatures of landowners for or against annexation. b. All other documents pertaining to annexation	Filed.	a. Permanent b. Permanent
7. APPOINTMENTS: Documents showing appointments of various county officers, giving name, date, term and oath of office	Filed. May be microfilmed	Permanent
8. APPRAISALS: State Lands		MCA 7-4-2613 (13)
9. ARTICLES OF INCORPORATION & ANNUAL STATEMENTS: a. Shows name of corporation, description and place of business, term, and names of applicants. b. Incorporation of local entities: see-Incorporation Papers/petitions	Filed. Paper- may be microfilmed. Historical value.	a. 25 years. See MCA 35-1-203 Currently filed in Secretary of State's office. Consult state Archivist before transferring to local historical society, museum, or library. b. Permanent
10. ASSESSMENT RECORDS: See CO. ASSESSOR Retention Schedule		
11. ATTACHMENTS / WRITS & INDEX: Transcripts of judgments that by law are made liens upon real estate.	Filed.	Permanent MCA 7-4-2613 (17)
12. AUDIT REPORTS: See ACCOUNTING / FINANCIAL retention schedules	Filed.	
13. BANKRUPTCY MATTERS: Many different types, refer to MCA's	Filed or Recorded	Permanent
14. BIDS: BANKING, MAINTENANCE, MISCELLANEOUS, PHYSICIANS, POOR, PRINTING	Filed.	Term + 2 years <b>NO RM60* REQUIRED</b>
15. BIDS: BRIDGES, ROADS, STRUCTURES: Bid sent to contractors specifying what materials required, time project completed, etc.	Filed. May microfilm for security and research	Awarded bid and specifications - Permanent or life of

**CR 5**

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		structure. All bids received Audit + 2* years.
16. BILLS OF SALE: Document showing sale of real or personal property indexed by grantor/grantee. Shows legal description, date of transaction and recording information	Filed or recorded	Permanent
17. BIRTHS: Access- see MCA's a. AFFIDAVITS: Notarized documents showing notarized proof of birth. b. CERTIFICATES: Certificate from health department c. REGISTER: Register showing names of parents and child, date of birth, etc. and birth certificate number d. CORRECTIONS: Letters or affidavits showing/requesting corrections in information on certificates. MCA 50-15-204 e. REQUEST LETTERS/FORMS: Letters or forms requesting copies of birth certificates f. SECURITY PAPER CERTIFICATES LEDGER: Ledger used for tracking numbered security paper copies of birth certificates.	Filed. Vital Records and Statistics Bureau has primary copy.	a.- d. Permanent See: MCA-7-4-2619 MCA 7-4-2613 (4) MCA 50-15-109 -114 MCA 50-15-203-206 MCA 50-15-304 MCA 50-15-121-123  e. 3 years from date of issuance <b>e. NO RM60* REQUIRED</b>  f. 3 years <b>f. NO RM60* REQUIRED</b>
18. BONDS / INDEX: a. Airport b. Bail c. Bridges / structures d. Community e. County f. Election g. Emergency h. Equipment i. General obligation j. Hazardous waste k. Indemnity l. Industrial m. Land n. Official o. Performance p. Property q. Register/ index r. Revenue s. School index t. Work place	Filed. May be microfilmed	See MCA 7-4-2613 a. Permanent b. Permanent c. Permanent -life of d. Permanent e. Permanent f. Term of office g. Permanent h. Permanent- life of i. Permanent j. Permanent k. Audit + 2 years* l. Permanent m. Permanent n. Permanent o. Permanent p. Permanent q. Permanent r. Permanent s. Permanent t. Permanent <b>f. and k. NO RM60* REQUIRED</b>
19. BOUNDARY LINES: Records showing county splits to create new counties; townships; schools, districts; road districts.	Filed. May microfilm for security and research	Permanent

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20. BUDGETARY, ACCOUNTING, AND REPORTING SYSTEM: See ACCOUNTING / FINANCE RETENTION SCHEDULE	Filed. If on computer - may COM.	
21. BUILDING PERMITS/ INSPECTIONS: Includes permits; maps, plans.	Filed. May microfilm for security and research	Permanent for life of structure
22. BURIAL RECORDS/INDEX: a. Poor: May show name, cause of death, age, relatives, etc. b. Veterans: Shows name, branch of service, cause of death, where buried, which war or peacetime, mortuary, amount paid by county for Veterans who died in county, etc.	Filed. If on computer- COM. May be microfilmed, then may be transferred to local historical society or local genealogy society, with the approval of the Local Government Records Committee.	a. Permanent b. Permanent
23. CANDIDATE FISCAL/FILING STATEMENT: Financial statement filed by candidates for elected positions disclosing contributions to campaign, etc.	Filed.	Term of office- See MCA 13-37-225 <b>NO RM60* REQUIRED</b>
24. CEMETERY RECORDS: May show - Owner, legal description of cemetery, codes, deed to lots, etc.	May microfilm	Permanent
25. CENSUS REPORTS/MAPS		Permanent
26. CERTIFICATE OF REDEMPTION: Redemption of property tax lien by the owner, the holder of an unrecorded or improperly recorded interest, the occupant of the property, or any interested party.	Filed.	Primary copy- Permanent Duplicate copy - Audit +1 year* See MCA 15-18-111-114 <b>Duplicate copy NO RM60* REQUIRED</b>
27. CERTIFICATE OF SURVEY: Map of land. Show owner of original acreage, lot sizes, easements, dates, sanitary restriction approvals, surveyor, relocation of common boundaries, mortgage exemption.	Filed.	Permanent
28. CLAIMS PAID: SEE ACCOUNTING/FINANCIAL RETENTION SCHEDULE		See MCA 7-5-2132
29. COMMISSIONERS a. Journals/Proceedings: Contains minutes of business acted upon, budgets, general administration, appointments,	Filed. Usually books. May be on computer. May microfilm	a. Permanent See MCA 7-4-2611; 7-5-2129-2130

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resolutions; tax levies, etc. b. Tapes c. Transcripts	for security and research.	b. & c. length determined by each entity. Take into account topic and possible litigation.
30. CONDOMINIUMS: Plans/blueprints and related documents for condos. Show locations of each unit, legal documentation, covenants.	Recorded. May microfilm for security and research	Permanent for life of structure.
31. CONSERVATION EASEMENTS: Voluntary covenant of restriction of use of land for purpose of maintaining or enhancing natural or environmental aspect of the land.	Recorded. May microfilm for security and research.	Permanent
32. CONTRACT FOR DEED/ NOTICE OF PURCHASERS INTEREST: Notice to public of sale of land by contract.	Recorded	Permanent
33. CONTRACT NOTES: Supporting documentation pertaining to each contract.		7 years after the expiration or termination of the record. <b>NO RM60* REQUIRED</b>
34. CONTRACTS & AGREEMENTS: a. Interlocal b. Intergovernmental		7 years after the expiration or termination of the record <b>NO RM60* REQUIRED</b>
35. CONTRACTS AND BONDS / LEASE PURCHASE AGREEMENTS: Agreement for purchase of: Vehicles, machinery, apparatus, appliances, equipment, materials or supplies; or construction, repair or maintenance of any building, road or bridge. Bonds: Security for completion of obligations. a. Copy of Valid Montana Contractor's License b. Proof of Worker's Compensation Coverage c. Copy of Certificate of Independent Contractor Registration d. General Liability Insurance Policy with County listed as additional insured e. Automobile Liability Policy f. Performance Security Bond or Surety or Payment Bond g. Copy of City Business License h. Copy of Business License from State of Montana		8 years after the expiration or termination of the record. <b>NO RM60* REQUIRED</b>
36. CORNER RECORDATION: Documents a survey mark by made by a surveyor.	Filed. May microfilm for security and research	Permanent MCA 70-22-104-109
37. CORONERS REGISTER: Shows if known: name of deceased, date, place, cause of death, coroner's name, etc.	May be microfilmed	Permanent

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38. CORRESPONDENCE: SEE- GENERAL SCHEDULES		
39. COUNTY TAX APPEAL BOARD a. AB-26 – Appeal Applications b. Appeal Decisions c. Acknowledgment Forms d. Exhibits e. Attendance Reports f. Minutes g. Electronic Recordings		a. 2 Years b. 2 Years c. 2 Years d. 2 Years e. Permanent f. Permanent g. 1 Year <b>a.-d. and g. NO RM60* REQUIRED</b>
40. DEATH CERTIFICATES: a. CERTIFICATES b. CORRECTIONS: Letters or affidavits showing/requesting corrections in information on certificates. c. REQUEST LETTERS/FORMS: Letters or forms requesting copies of death certificates. d. SECURITY PAPER CERTIFICATES LEDGER: Ledger used for tracking numbered security paper copies of death certificates.	Filed.	a. & b. Permanent: see MCA 7-4-2613 & 7619 MCA 50-15-206 MCA 50-15-121-124 c. 3 years from date of issuance d. 3 years <b>c and d. NO RM60* REQUIRED</b>
41. DECLARATION OF OCCUPANCY / DECLATORY STATEMENTS / INDEXES: Declarations of land possessions, names land descriptions. (Prior to deeds)	Recorded. May microfilm for security and research	Permanent MCA 7-4-2613
42. DEED EXHIBITS: Maps or associated documents for deeds.	Filed. May microfilm for security and reference	Permanent MCA 7-4-2613
43. DEEDS: INDEXES & REGISTERS: Includes: Warranty; quit claim; patented; homestead; bargain and sale; tax deed; declaration of occupancy; notice /application of tax deed; grant mining. Indexed by grantor/grantee. Shows legal description, date of transaction and recording. May show: restrictive covenants, easements, Certificate of Survey number, Plat name, acreage, block and lot number.	Recorded. May microfilm for security and reference	Permanent See MCA 7-4-2613
44. DOG MATTERS: See Opinions & Resolutions	Filed	
45. EASEMENTS: Provided for utility, drainage, vehicular or pedestrian access.	Recorded. May microfilm for security and research.	Permanent
46. ELECTION RECORDS: See Election retention schedule from the Secretary of State's Office.		
47. EXECUTIONS: Issued for enforcement of a judgment.		MCA 25-13-101-904

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48. FARM AND RANCH CERTIFICATES/REGISTER/INDEX: Names, dates, place, description, title, certificate numbers.	Filed. May microfilm for security and research	Permanent
49. FICTITIOUS NAMES: Names of individuals or business d/b/a doing business as.	Filed. May microfilm for security and research	Permanent
50. FINANCIAL REPORTS/ AUDITS: See ACCOUNTING / FINANCIAL RETENTION SCHEDULE	Filed.	
51. FINANCING STATEMENTS/ UCC'S & AFFIDAVITS: (Uniform Commercial Code) Same as: Chattel mortgages, Retail Installment Contracts, Unconditional Sales Contracts	Filed.	5 years to 30 years from date of filing, depending on type or statement. See MCA 30-9A-515. <b>NO RM60*</b> <b>REQUIRED</b>
52. FIRE DISTRICT RECORDS: a. Files b. Rosters	Filed.	a. 10 years after dissolution  b. Permanent
53. FIXED ASSET RECORDS: County property and value. a. Asset record/card b. Inventory of all county assets-conducted by governing body.	File	a. Life of Asset + Audit + 1 year* b. Audit + 1 year <b>NO RM60*</b> <b>REQUIRED</b>
54. FLOOD PLAIN RECORDS: Includes: Insurance, maps, permits.	Filed. May microfilm for security and research.	Permanent
55. GAMBLING MATTERS: Resolutions/regulations pertaining to gambling.	Filed.	Permanent
56. GRANTS: a. Federal b. Local c. Miscellaneous d. State	Filed	a. Determined on grant b. Audit +2 years* c. Audit + 2 years* d. Audit + 2 years* <b>b. – d. NO RM60*</b> <b>REQUIRED</b>
57. GRAZING DISTRICTS: See HERD DISTRICT	Filed	
58. HAZARDOUS CHEMICAL INFORMATION: a. Index	Filed. Currently filed with fire	a. & b. Senate Bill 452 (1985)

**CR 10**

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b. Inspections c. Materials Safety Data Sheets-MSDS	departments	c. If Recorded-Permanent
59. HERD DISTRICT/GRAZING DISTRICTS: Shows land recorded as grazing land, names and area etc. a. Files b. Maps c. Petitions	Filed. May microfilm for security and research	Permanent
60. HUD FILES: Housing and Urban Development: Includes Grants, Promissory notes.	Filed	Expiration + 5 years  <b>NO RM60* REQUIRED</b>
61. INCORPORATION PAPERS / PETITIONS: Documents pertaining to the incorporation of towns, cities, etc.	Filed May microfilm for security and research	Permanent
62. INDIVIDUAL / SEPARATE PROPERTY OF MARRIED PERSONS: / INDEX: Property which is not jointly owned.	Recorded	Permanent MCA 7-4-2613 (20)
63. INHERITANCE TAX RECORDS (INH): Ownership of property by two or more persons having as one of the incidents of such ownership the right of survivorship in the surviving owner or owners upon the death of one of the owners.	Filed and/or recorded	Permanent
64. INSPECTIONS: a. Safety b. Weights and measures	Filed	a. Permanent b. Permanent See MCA 7-21-3106
65. INSURANCE POLICIES: a. County b. Employee Group	Filed	a. Expiration + 25 years b. Expiration + 25 years
66. INTENT TO HOLD: Notice to public of inability to perform annual representation on mining claim but intent to hold claim.	Filed	Permanent
67. JUDGES TRAIN CERTIFICATES/TRANSCRIPTS: A certificate of completion of a course of education and training prescribed by the commission. See MCA 3-1-1502	Filed	Term of office  <b>NO RM60* REQUIRED</b>
68. JUSTICE OF THE PEACE DOCKETS: a. Pre 1920-volumes	Historical value	a. & b. Permanent Revised 10-2004, to

**CR 11**

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b. Post 1920 volumes		comply with Courts of Limited Jurisdiction schedule.
69. LAND / LOT / TRACT BOOKS: Trace ownership by legal description. May have maps. Shows Section, Township, Range, acreage, lot/block identification, book and page numbers where recorded.	May microfilm for security research.	Permanent
70. LEASE RECORDS / INDEX: a. Oil, gas, mineral, timber b. Assignments c. Miscellaneous d. County	a. Recorded b. Recorded c. Recorded d. Filed	See MCA 7-4-2619 7 a. Permanent b. Permanent c. Permanent d. Permanent
71. LICENSES: a. Business b. Dog c. Register	Filed	a. Audit + 2 years* b. Audit + 2 years* c. 1 year after last entry + Audit +2 years. * <b>NO RM60*</b> <b>REQUIRED</b>
72. LIENS: a. Federal Tax b. Local Government c. Mechanics d. Miscellaneous e. Notice of Right to Claim	Filed	8 years after canceled or lapsed  <b>NO RM60*</b> <b>REQUIRED</b>
73. LIS PENDENS: Shows cause of suit, names of parties, description of property involved, amount, dates.	Filed	Resolved + 8 years <b>NO RM60*</b> <b>REQUIRED</b>
74. LOCAL NEWSPAPERS: May be kept for historic purposes. Check with the local newspaper office to see if they are microfilming them, and with the local historical society and state archives.		
75. MEMORANDUMS: See GENERAL SCHEDULES RETENTION SCHEDULE.		
76. MILITARY DISCHARGE / SERVICE RECORDS a. MILITARY DISCHARGE / SERVICE RECORDS AND INDEX Shows name branch of service, years served, rank, date of birth, place of birth, commendations, etc. May also be called DD214. May have related documents recorded with discharge papers. b. REQUEST LETTERS/FORMS: Letters or forms requesting copies of discharge/service records	Recorded. CONFIDENTIAL per MCA 7-4-2614 May microfilm for security and reference	a. Permanent MCA 2-6-401 MCA 7-4-2614 (new 2003) b. 2 years from date of issuance  <b>b. NO RM60*</b> <b>REQUIRED</b>
77. MINERAL BOOKS: Traces ownership of patented mining claims by legal description, usually by Section, Township,	May microfilm for security and reference	Permanent

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and Range.		
78. MINING RECORDS / INDEX: Includes Notice of Locations; Placer, Quartz, Surface, Applications, Annual reports, Intent to Hold, Locators Rights on Tribal Timber Land, Maps, Survey books, Permits, Millsites	Recorded May microfilm for security and reference	Permanent MCA 7-4-2613 #13 & 14
79. MINUTES / INDEX: SEE GENERAL SCHEDULE a. Board of County Commissioners b. Staff/Committees, Advisory Boards, Department Heads, Other Elected Official Meetings, Salary Compensation Board c. Administrative Board, District, or Commission created under 7-1-201 through 7-1-203 MCA	<b>May be microfilmed or stored electronically. If an official recording is made a written record of the meeting must also be made per 2-3-212(2) MCA. If the minutes are recorded and designated as the official record, a log or time stamp for each main agenda item is required for the purpose of providing assistance to the public in accessing that portion of the meeting. A data migration plan for official recordings and electronic records must be maintained.</b>	a. Permanent b. Permanent c. Permanent
80. MISCELLANEOUS FILING/ INDEX: May contain same items as MISCELLANEOUS RECORDS/ INDEX	Recorded	10 years. Analyze and retain items of continuing importance.
81. MISCELLANEOUS RECORDS/INDEX: May contain: Power of attorney, military discharges, bids, bylaws, conservation easements, leases, restrictive covenants, petitions, fictitious names, attachments, easements, marriages, water rights, real property, etc. May be known as "SMALL" and "LARGE"	Recorded	Permanent- because of the variety of records
82. MOBILE HOME-Intention to Transfer Title	Filed	5 years House Bill 160 (1985) See MCA 61-3-207 <b>NO RM60* REQUIRED</b>
83. MORTGAGE RECORD / INDEX: Real Property- includes: Abstracts, assignments, satisfactions, reconveyances, etc.	Recorded May microfilm for security and reference. If on computer, COM.	Permanent MCA 7-4-2619
84. MUSEUMS: Documentation pertaining to establishment, operation and inventory.	Filed	Permanent

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85. NOTARY COMMISSIONS: Certificate of Commission issued by Secretary of State	Filed See MCA 1-5-405	Permanent
86. OBSOLETE RECORDS: See last page of this schedule		
87. OATHS OF OFFICE: Oath of all elected or appointed officials.	Filed	Permanent MCA 7-4-101
88. OPINIONS: See GENERAL SCHEDULES Correspondence -Official		Permanent
89. ORDERS AND DECREES: Instrument or judgment affecting the title to or possession of real or personal property.	Recorded	Permanent
90. PAYROLL DATA: See ACCOUNTING / FINANCIAL RETENTION SCHEDULE- Payroll Records		
91. PERMITS: a. Geophysical b. Surface	Filed	a. Permanent b. Permanent See MCA 82-1-105
92. PEST CONTROL: Documents pertaining to creation of control districts or programs: a. Mosquito MCA 7-22-24 b. Rodent MCA 7-22-22 c. Agricultural Insect Pests MCA 80-7-503 d. Vertebrate pests MCA 7-22-25 e. Insect pests MCA 7-22-23	Filed. May microfilm for security and research.	Permanent
93. PETITIONS: a. Maintenance b. Miscellaneous c. Road viewers reports. d. School district-annexation, boundary e. Special Districts f. Streets/roads/alleys - See Roads/ Streets/ Alleys g. Zoning	Filed. May microfilm for security and research.	a. Per term of subject b. Per term of subject <b>a.-b. NO RM60* REQUIRED</b> c. Permanent d. Permanent e. Permanent f. Permanent g. Permanent
94. PHYSICIANS/ DENTISTS CERTIFICATES:	Filed	Permanent
95. PLANS: COUNTY- May include: a. Airport Master plan b. Civil Defense Emergency plan c. Industrial Park. d. Planning Board/ Interlocal agreement e. Project Management.	Filed. May microfilm for security and reference.	a. Permanent b. Until superseded c. Permanent d. Permanent e. Permanent f. Until superseded

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f. Schools g. Urban Growth h. Utilities: sewer, lights, water		g. Until superseded h. Permanent <b>b, f .and g, NO RM60* REQUIRED</b>
96. PLATS/RELATED DOCUMENTS: Maps of platted subdivisions. Shows block and lots, parcels, streets, alleys, dedications, dimensions, original landowners, dates. Includes. Plat approval records (SPA); Plat checklist records (SAC)	Recorded May microfilm for security and reference.	Permanent
97. POLICY STATEMENTS: See GENERAL SCHEDULES RETENTION SCHEDULE- Correspondence: Official	Filed	
98. POWER OF ATTORNEY REGISTER /INDEX: Alphabetical listing of persons executing power of attorney and to whom powers are given.	Recorded	Permanent MCA 7-4-2619 (6)
99. RANCH CLAIMS AND DITCH RECORDS:	Recorded	Permanent
100.RECEIPTS: a. A101-Duplicate b. Certified Copy c. Counter d. Document e. Disbursement f. Miscellaneous		a. Audit +1* b. Audit +1* c. Audit +1* d. Audit +1* e. Audit +1* f. Audit +1* <b>NO RM60* REQUIRED</b>
101.RECEPTION AND FEE RECORD/INDEX: May be called Year Book, Reception Book: Register and index of all documents recorded. Shows names, type of document, legal description, fee charged, document number, if returned, who returned to.	May microfilm for security and research. If on computer, may be put on COM	Permanent
102. REDEMPTION NOTICES / RECORDS: Notice that delinquent taxes owing have been paid by a party with a recorded interest in the property.	Filed-Duplicates	Audit +1* <b>NO RM60* REQUIRED</b>
103. RESOLUTIONS: a. City b. County c. School d. Miscellaneous	Filed. May microfilm for security and reference.	a. Permanent b. Permanent c. Permanent d. Permanent
104. ROAD / STREET / ALLEY / BRIDGE RECORDS: Includes petitions/orders to create, open, close or vacate any/all county roads; road viewers reports, and field notes.	Filed May microfilm for security and research	Permanent
105. SEWER / SEPTIC PERMITS: a. Application b. Maps c. Permits d. Plans	Filed May microfilm for security and research	a. Permanent b. Permanent c. Permanent d. Permanent

CR 15

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\* **Final report received by County Commissioners** **FOR RECORD DISPOSAL SEE MCA 2-6-403**  
**SEE MCA 7-4-2635 FOR RECORD PRESERVATION** (Budgetary Accounting and Reporting System fund code # 2393)  
Last Revised: 04-2017

106. SHERIFF CERTIFICATE OF SALE / REDEMPTIONS: Notice to public that property has been sold at auction by County Sheriff. May be redeemed within 1 year.	Filed	10 years MCA 25-13-7&8
107. STATE BOARD OF EQUALIZATION REPORTS: Statement sent to each county in which state has real property in excess of 6% of the total land area of one county and from which the state derives grazing, agricultural, or forest income. Contains total acreage owned by state and lists acres separately by use type.	Filed	25 years  See MCA 77-1-501
108. STUDY COMMISSION: See General Schedules Task Force Minutes a. Reports	Filed	Permanent
109. TAX DEED: a. Books b. Notices c. Records d. Sales Certificate-Sheriff	Recorded	a. Permanent b. Permanent c. Permanent d. 10 years
110. TAX RECEIPT- REAL ESTATE -PAID See TREASURER RETENTION SCHEDULE		
111. TAX SALES: a. Certificates and List- A certificate/list offering for sale by County Treasurer of property tax lien representing delinquent taxes including penalties, interests, and costs. b. Register - See: Tax Deed- Book	Filed	a. Primary copy 10 years  Duplicate copy Audit + 1 year*  b. Permanent
112. TOWNSITES / TOWN PLATS / TOWN LOTS: May show: Applications for deeds for towns, property owners, land descriptions, plats with lots & blocks.	May microfilm for security and research.	Permanent
113. TREASURERS CASH COUNT REPORT- Monthly report		Audit +1 year <b>NO RM60*</b> <b>REQUIRED</b>
114. URBAN TRANSPORTATION RECORDS: See Contract and Agreements	Filed	Permanent or life of contract or agreement
115. VACATING STREETS/ ROADS/ ALLEYS- See ROADS		
116. WATER RIGHT RECORDS / INDEXES: All water right records, including: surface, well, irrigation, ditches.	Recorded and/or filed. May microfilm for security and research	Permanent MCA 7-4-2613 (11) MCA 7-4-2615
117. ZONING /ZONING DISTRICT RECORDS:	Filed	Permanent

**CR 16**

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**\* Final report received by County Commissioners** **FOR RECORD DISPOSAL SEE MCA 2-6-403**  
**SEE MCA 7-4-2635 FOR RECORD PRESERVATION** (Budgetary Accounting and Reporting System fund code # 2393)  
 Last Revised: 04-2017

## **DISCONTINUED, INACTIVE, OR OBSOLETE RECORDS WHICH ARE NOT ON AN OFFICE SCHEDULE OR COVERED BY A STATUTE**

Many of these have historical value, and should be retained for research. Consult with the State Archivist before transferring to local historical society, museum, library, or genealogy society. Examples of titles and types of records include:

1. Bargain & Sale Record
2. Beer Act- 1933- lifting Prohibition. Licenses issued
3. Bounty records- Affidavits for killing of livestock destroying animals. Shows Name, date, type and number animals killed
4. Cattle/Horse Brand Inspections
5. CCC- Civilian Conservation Files
6. Communicable Diseases Record
7. Dental/Medical License Register
8. Farm/ Ranch name register
9. Indictment Record Books-Gives name of defeneded, charge, warrant.
10. Jail Book of Boarders- not inmates
11. Military registration rolls/Conscription
12. Montana Relief Commission Project Register
13. Mothers Pensions
14. Motions Picture/ Film/Photos
15. Newspapers
16. NYA Files - National Youth Administration (1935-1943)
17. Old Age Pensions
18. Pest Control Records
19. Photographs
20. Poll tax
21. Poor Farm/House /Hospital records
22. Register of Stallions
23. Resignations
24. Scrapbooks- May have elections returns, public notice, newspaper clippings, etc.
25. Trade Stimulator Tax Receipts
26. Unfinished business Receipts
27. War Risk Insurance
28. Widows and Orphans
29. WPA files- Works Progress Administration



## *Revisions to Schedule*

Date	Revision	Change
1997	1	<p><b>Revisions to COUNTY CLERK AND RECORDER Retention <u>Schedule 8-1997</u></b></p> <p>Changed title from TAX SALE CERTIFICATE to TAX SALES; sub titles Certificates and List and added REGISTER under title.</p>
5-2001	1.1	<p><b>BIRTHS-</b> Removed “CONFIDENTIAL/RESTRICTED ACCESS”. Added “Access-See MCA’s” to Record Title. and Description; removed “NEW CODES JAN 1996” from comments.</p> <p><b>DEATHS-</b> Removed” CONFIDENTIAL. RESTRICTED ACCESS . Issued from state to counties” from Record Title and Description; removed “NEW CODES JAN 1996” from comments.</p> <p>Cleaned up punctuation errors.</p>
5-2003	1.2	<p><b>FINANCING STATEMENTS-</b>changed Retention Time to comply with new MCA. Added: “5 years to 30 years from date of filing, depending on type of statement. See MCA 30-9A-515”. Removed : “8 years after lapse or termination. See MCA 30-9-403,404,411” (These MCA’s were repealed in 1999)</p> <p><b>MILITARY DISCHARGES/SERVICE RECORDS AND INDEX-</b> Added to Comments “Confidential per MCA 7-4-1614”. Added to Retention Time: “MCA 7-4-1614 (new 2003)</p>
11-2003	1.3	<p><u>Item 16.</u> BIRTHS – Retention time a.-d. PERMANENT; Added e. REQUEST LETTERS/FORMS: Letters or forms requesting copies of birth certificates. Retention time 2 years from date of issuance</p> <p><u>Item 38.</u> DEATH CERTIFICATES Made- a. CERTIFICATES Retention time a. CERTIFICATES – Permanent b. REQUESTS LETTERS/FORMS: Letters or forms requesting copies of death certificates Retention time b. REQUEST LETTERS/FORMS 2 years from date of issuance</p> <p><u>Item 74.</u> MILITARY DISCHARGE/SERVICE RECORDS AND INDEX: Made – a. MILITARY DISCHARGE / SERVICE RECORDS AND INDEX Shows name branch of service, years served, rank, date of birth, place of birth, commendations, etc. May also be called DD214. May have related documents recorded. Retention time- Permanent b. REQUEST LETTERS/FORMS: Letters or forms requesting copies of discharge/service records. Retention time 2 years from date of issuance</p>
10-2004	1.4	<p><u>Item 38.</u> DEATHS- Retention time a. – c. Permanent Added b. CORRECTIONS: Letters or affidavits showing/requesting corrections in information on certificates. Retention time changed to read a. &amp; b. Permanent Changed item “b”. REQUEST LETTERS/FORMS : Letters or forms requesting copies of death certificates. to “c”. changed retention time to “c”.</p> <p><u>Item 66.</u> JUSTICE OF THE PEACE DOCKETS Retention time- changed to read a. &amp; b. Permanent Revised 10-2004 , to comply with Courts of Limited Jurisdiction schedule. Deleted b. 10 years. Consult State Archivist before transferring to local museum, historical society, library.</p>

## *Revisions to Schedule*

Date	Revision	Change
5-2005	1.5	<p><u>Item 32. CONTRACT NOTES.</u> Retention time- changed time to: 7 years after the expiration or termination of the record.</p> <p><u>Item 33. CONTRACTS &amp; AGREEMENTS</u> Retention time changed to: 7 years after the expiration or termination of the record.</p> <p><u>Item 34. CONTRACTS AND BONDS / LEASE PURCHASE:</u> 7 years after the expiration or termination of the record.</p>
10-2006	2	<p><u>Item 16 BIRTHS</u> Changed e. REQUEST LETTERS/FORMS Retention time changed to 3 years from date of issuance.</p> <p><u>Item 38 DEATH CERTIFICATES</u> Changed c. REQUEST LETTERS/FORMS Retention time changed to 3 years from date of issuance.</p> <p><u>Inserted new item: Note: all items on schedule after this are renumbered.</u> <u>Item 111 TREASURERS CASH COUNT REPORT-</u> Monthly report. Retention time: Audit +1 year</p>
4-2010	2.1	<p><u>Item 51 FIXED ASSET RECORDS-</u> Changed to have separate sub categories: a. Asset record /card, and b. Inventory of all county assets conducted by governing body; with different retention times. From “Life Audit +1 year” to: a. Life of asset + Audit + 1 year, and b. Audit + 1 year.</p>
4-2010 (cont)	2.1 (cont)	<p><u>Inserted new item: Note: all items after this are re-numbered</u> <u>Item 85 NOTARY JOURNALS</u></p>
5-2013	2.2	<p><b><u>REVISION 2.2 5-2013</u></b> <u>Inserted new item: Note: all items on schedule after this are renumbered.</u> <u>Item 4 AFFIDAVITS OF PUBLICATION</u> - Retention time: 2 years</p>
11-2013	2.3	<p><u>Inserted new items:</u> <u>Item 17 (BIRTHS) f. and Item 39 (DEATH CERTIFICATES) d. SECURITY CERTIFICATES LEDGER</u> – Retention time: 3 years</p>
5-2014	No longer	<u>DELETED:</u>

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## *Revisions to Schedule*

Date	Revision nos.	Change																
	using revision nos.	<p><b>Item 84 - NOTARY JOURNALS</b> - Tracks the activity of each notary act as performed by certified notary. Includes: correspondence, reports, applications, financial documents - MCA 1-5-419 – retention: Permanent.  <b>Reason:</b> The Law changed October 2013 – all journals are now deposited with Secretary of State.  <b>Note: all items on schedule after this are renumbered.</b></p> <p><b>ADDED:</b>  <b>Item 35 – CONTRACTS &amp; BONDS/LEASE PURCHASE AGREEMENTS – <u>items a – h</u></b></p> <ul style="list-style-type: none"> <li>a. Copy of Valid Montana Contractor’s License</li> <li>b. Proof of Worker’s Compensation Coverage</li> <li>c. Copy of Certificate of Independent Contractor Registration</li> <li>d. General Liability Insurance Policy with County listed as additional insured</li> <li>e. Automobile Liability Policy</li> <li>f. Performance Security Bond or Surety or Payment Bond</li> <li>g. Copy of City Business License</li> <li>h. Copy of Business License from State of Montana.</li> </ul>																
5-2015		<p><b>ADDED:</b></p> <table border="0" style="width: 100%;"> <tr> <td colspan="2"><b>39. COUNTY TAX APPEAL BOARD</b></td> </tr> <tr> <td>a. AB-26 – Appeal Applications</td> <td>a. 2 Years</td> </tr> <tr> <td>b. Appeal Decisions</td> <td>b. 2 Years</td> </tr> <tr> <td>c. Acknowledgment Forms</td> <td>c. 2 Years</td> </tr> <tr> <td>d. Exhibits</td> <td>d. 2 Years</td> </tr> <tr> <td>e. Attendance Reports</td> <td>e. Permanent</td> </tr> <tr> <td>f. Minutes</td> <td>f. Permanent</td> </tr> <tr> <td>g. Electronic Recordings</td> <td>g. 1 Year</td> </tr> </table> <p><b>Note: all items on schedule after this are renumbered.</b></p>	<b>39. COUNTY TAX APPEAL BOARD</b>		a. AB-26 – Appeal Applications	a. 2 Years	b. Appeal Decisions	b. 2 Years	c. Acknowledgment Forms	c. 2 Years	d. Exhibits	d. 2 Years	e. Attendance Reports	e. Permanent	f. Minutes	f. Permanent	g. Electronic Recordings	g. 1 Year
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4-2017		Added “NO RM60 REQUIRED” to comments as appropriate																

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