



PROPOSAL KIT SAMPLE

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Application for Records Retention Form

DEPT NAME:			
DEPARTMENT LOCATION:	<<Building>>		
DEPARTMENT MANAGER:	<<Name>><<Title>>	<<PHONE>>	<<Email>>
DEPARTMENT RECORDS LIAISON:	<<Name>><<Title>>	<<PHONE>>	<<Email>>

Describe the content of the records to be stored such as: Invoices, Contracts, Sales Orders, Bid Documents, Annual Review, etc.

List Record Types	Retention (i.e. 3, 7, 10 year)	Legal Regulations (SOX, HIPPA, PCI, etc.)	Media Type (Physical or Electronic)	Search Metadata	Access Requirements	Estimated Volume (pages or file size)
1. <<RECORD TYPE>>						
2. <<RECORD TYPE>>						
3. <<RECORD TYPE>>						
4. <<RECORD TYPE>>						

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