

## ORDINANCE NO. 2014-14

### Records Retention Ordinance

#### Executive Summary

Section 59.54(4), Wis. Stats., sets forth the process for destruction of obsolete county records, specifying how long each type of record must be kept, with a default 7 year period for any type of record not listed specifically therein or governed by another statute. The Wisconsin Public Records and Forms Board has approved 79 pages of reduced retention periods for many county records, reducing space needed for storage. Pursuant to County Board Rule 3.04(1) the County Administrator may present matters to the Board for its consideration. This item is presented for action by the Administrator.

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THE COUNTY BOARD OF SUPERVISORS OF JEFFERSON COUNTY DOES  
HEREBY ORDAIN AS FOLLOWS:

Section 1. The Records Retention Ordinance is created as follows:

**A. Purpose.** The purpose of this ordinance is to establish a county wide records retention schedule and authorize destruction of county records pursuant to that schedule on an annual basis. Record custodians do not have the authority to destroy records prior to the established retention period unless such records have been photographically reproduced as original records pursuant to § 16.61(7), Wisconsin Statutes. If there is not a specific law requiring a specific retention period, all records must be retained seven (7) years, unless the Wisconsin Public Records and Forms Board has approved a shorter period.

**B. Definitions.** As used in this ordinance:

*Legal custodian* means the individual responsible for maintaining records pursuant to § 19.33, Wisconsin Statutes.

*Record* means record as defined in § 19.32(2), Wisconsin Statutes.

**C. Historical Society Notification.** Prior to the destruction of any public record described in this section, at least sixty (60) days' notice in writing shall be given to the State Historical Society of Wisconsin, unless such notice has been waived in advance by the State Historical Society as part of the Records and Forms Board approval process.

**D. Destruction After Request for Inspection.** No requested record may be destroyed until after the request is granted by the State Historical Society of Wisconsin or sixty (60) days after the request is denied. If any action is commenced under §19.36(6), Wisconsin Statutes.

**E. Destruction Pending Litigation.** No record subject to pending litigation shall be destroyed until the litigation has been resolved.

**F. Preservation of County Records.** County records may be kept and preserved by any means approved by the County Board and allowed by Wisconsin Statutes. County records may be kept and preserved through the use of microfilming that meets the applicable standards established in § 16.61(7), Wis. Stats. After verification that destruction is allowed, paper records may be destroyed if these records are to be preserved in accordance with this section.

**G. Review and Approval by Public Records and Forms Board.** Retention periods approved by the Public Records and Forms Board from time to time are incorporated in this ordinance as if fully set forth.

Section 2. This ordinance shall be effective after passage and publication as provided by law.

Adopted by the Jefferson County Board of Supervisors this 10th day of June 2014.

s/Jim Schroeder

Jim Schroeder

Chair

ATTEST:

s/Barbara A. Frank

Barbara A. Frank, County Clerk

Published this 16th day of June 2014.

Addendum A

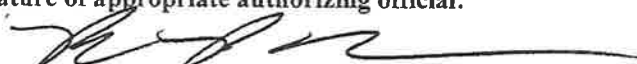
**COUNTY RECORDS RETENTION/DISPOSITION SCHEDULE**

**NOTIFICATION OF ADOPTION**

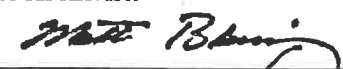
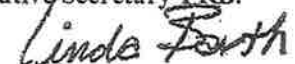
1. Officially [by adoption of a resolution or enactment of an ordinance] adopt, revise and adopt, or opt out<sup>1</sup>
2. Complete and send the original and 2 copies to: State Archivist, State Historical Society of Wisconsin, 816 State Street, Madison, Wisconsin 53706-1488.
3. A signed copy will be returned for your files and the additional copies will be filed with the State Archives and with the Public Records Board.
4. Destruction of records according to this schedule is NOT permitted until this form is signed by the State Historical Society of Wisconsin and, for records less than 7 years old, the Wisconsin Public Records Board.

<b>County:</b> JEFFERSON	<b>Telephone (area code/no.):</b> (920) 674-7135
<b>Address (Street, City and Zip):</b>  311 South Center Avenue Jefferson, WI 53549	

This is to notify the State Historical Society of Wisconsin and the Wisconsin Public Records Board that the county named above has officially adopted the County Records/Disposition Schedule.

<b>Name of appropriate authorizing official</b> (County Board Chairperson or County Administrator/Executive):  Ben Wehmeier, County Administrator	<b>Title:</b>
<b>Signature of appropriate authorizing official:</b> 	<b>Date signed (mo/day/yr):</b> 07/03/18

The Wisconsin Public Records Board and the State Historical Society of Wisconsin acknowledge your Notification of Adoption of the County Records/Disposition Schedule. You are hereby authorized to retain, transfer, and dispose of records as indicated on the schedule.

<b>State Archivist:</b> 	<b>Date Signed:</b> 7/18/18	<b>Executive Secretary-PRB:</b> 	<b>Date Signed:</b> 8/15/18
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Restrictions on records destruction contained in s. 19.35(5), WI Statutes (Open Records Law), apply prior to destruction. No records should be destroyed if a request for inspection or copying is pending or if litigation involving these records has commenced.

<sup>1</sup>Opting in (in whole or part) will not obligate a county to create a record. Doing so only requires that a county follow the retention schedule / disposition guidelines if such records exist (i.e., county has created or received such records).

If opt out in part (i.e., revise and opt in)... a county would need to develop and obtain PRB approval of an independent records retention schedule / disposition guidelines for those areas not covered.

If opt out in whole... a county would need to develop and obtain PRB approval of an independent / separate records retention schedule / disposition guidelines.

Addendum B

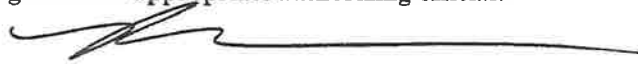
COUNTY CLERK  
RECORDS RETENTION SCHEDULE

NOTIFICATION OF ADOPTION

1. Officially adopt the general schedule by means of a county resolution or ordinance.
2. Complete and send the original and 2 copies to: State Archivist, State Historical Society of Wisconsin, 816 State Street, Madison, Wisconsin 53706-1488.
3. A signed copy will be returned for your files and the additional copies will be filed with the State Archives and with the Public Records Board.
4. Destruction of records according to the general schedule is NOT permitted until this form is signed by the State Historical Society of Wisconsin and, for records less than 7 years old, the Wisconsin Public Records Board.

County: <u>Jefferson</u>	Telephone (area code/no.): <u>920-674-7144</u>
Address (Street, City and Zip): <u>311 S. Center Ave.</u> <u>Jefferson WI 53549</u>	

This is to notify the State Historical Society of Wisconsin and the Wisconsin Public Records Board that the county named above has officially adopted the County Clerk Records Retention Schedule.

Name of appropriate authorizing official (County Board Chairperson or County Administrator/Executive): <u>Benjamin P. Wehmer</u>	Title: <u>County Administrator</u>
Signature of appropriate authorizing official: 	Date signed (mo/day/yr): <u>07/03/18</u>

County Clerk (please print): <u>Barbara A. Frank</u>	
Signature of County Clerk: <u>Barbara A. Frank</u>	Date signed: <u>6/29/2018</u>

The Wisconsin Public Records Board and the State Historical Society of Wisconsin acknowledge your Notification of Adoption of the County Clerks Retention Schedule. You are hereby authorized to retain, transfer, and dispose of records as indicated on the schedule.

State Archivist: <u>Mark Babin</u>	Date Signed: <u>7/18/18</u>	Executive Secretary-PRB: <u>Linda Forth</u>	Date Signed: <u>8/15/18</u>
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Restrictions on records destruction contained in s. 19.35(5), WI Statutes (Open Records Law), apply prior to destruction. No records should be destroyed if a request for inspection or copying is pending or if litigation involving these records has commenced.

Addendum C

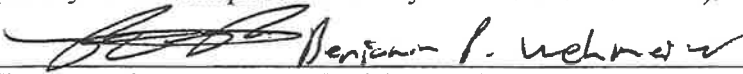

COUNTY TREASURER  
RECORDS RETENTION SCHEDULE

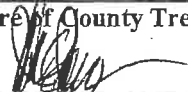
**NOTIFICATION OF ADOPTION**

1. Officially adopt the general schedule by means of a county resolution or ordinance.
2. Complete and send the original and 2 copies to: State Archivist, State Historical Society of Wisconsin, 816 State Street, Madison, Wisconsin 53706-1488.
3. A signed copy will be returned for your files and the additional copies will be filed with the State Archives and with the Public Records Board.
4. Destruction of records according to the general schedule is NOT permitted until this form is signed by the State Historical Society of Wisconsin and, for records less than 7 years old, the Wisconsin Public Records Board.

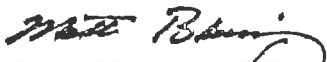
<b>County:</b> Jefferson	<b>Telephone (area code/no.):</b> (920) 674-7135
<b>Address (Street, City and Zip):</b> 311 So. Center Ave Jefferson, WI 53549	

This is to notify the State Historical Society of Wisconsin and the Wisconsin Public Records Board that the county named above has officially adopted the County Treasurer Records Retention Schedule.

<b>Name of appropriate authorizing official</b> (County Board Chairperson or County Administrator/Executive): 	<b>Title:</b> County Administrator
<b>Signature of appropriate authorizing official:</b> 	<b>Date signed (mo/day/yr):</b> 07/03/18

<b>County Treasurer (please print):</b> JOHN E. JENSEN	
<b>Signature of County Treasurer:</b> 	<b>Date signed:</b> 5/25/18

The Wisconsin Public Records Board and the State Historical Society of Wisconsin acknowledge your Notification of Adoption of the County Treasurer Retention Schedule. You are hereby authorized to retain, transfer, and dispose of records as indicated on the schedule.

<b>State Archivist:</b> 	<b>Date Signed:</b> 7/18/18	<b>Executive Secretary-PRB:</b> Linda Forth	<b>Date Signed:</b> 8/15/18
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Restrictions on records destruction contained in s. 19.35(5), WI Statutes (Open Records Law), apply prior to destruction. No records should be destroyed if a request for inspection or copying is pending or if litigation involving these records has commenced.

Addendum D

**Retention and Disposal of Court Records**

The retention and disposal of court records is governed by Section 757.54 Wisconsin Statutes and Chapter SCR 72. A summary of the statutory and rule provisions follows.

**Section 757.54 Wisconsin Statutes - Retention and Disposal of Court Records.**

Provides that "...the retention and disposal of all court records and exhibits in any civil or criminal action or proceeding or probate proceeding of any nature in a court of record shall be determined by the supreme court by rule..."

**Chapter WI SCR 72 - Retention and Maintenance of Court Records.**

**WI SCR 72.01.**

Establishes the minimum retention periods for original paper records of any court.

**WI SCR 72.02.**

Sets out the procedure for disposal of court records.

**WI SCR 72.03.**

Provides for the destruction of original court record after microfilming or electronically or optically storing.

**WI SCR 72.04.**

Requires that, prior to destruction, the custodian of the court record provide notice and offer title to the state historical society

**WI SCR 72.03.**

Destruction of Original Court Record after Microfilming or Electronically or Optically Storing.

**WI SCR 72.06.**

Addresses expunction of a court record.

Section 757.54 Wisconsin Statutes and Chapter WI SCR 72 are incorporated herein by reference as presently constituted or hereafter revised.

Addendum E

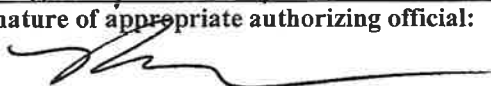
REGISTER OF DEEDS  
RECORDS RETENTION SCHEDULE

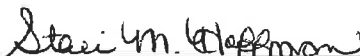
**NOTIFICATION OF ADOPTION**

1. Officially adopt the general schedule by means of a county resolution or ordinance.
2. Complete and send the original and 2 copies to: State Archivist, State Historical Society of Wisconsin, 816 State Street, Madison, Wisconsin 53706-1488.
3. A signed copy will be returned for your files and the additional copies will be filed with the State Archives and with the Public Records Board.
4. Destruction of records according to the general schedule is NOT permitted until this form is signed by the State Historical Society of Wisconsin and, for records less than 7 years old, the Wisconsin Public Records Board.

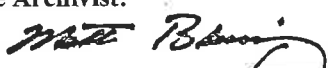
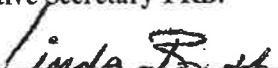
<b>County:</b> Jefferson	<b>Telephone (area code/no.):</b> 920-674-7236
<b>Address (Street, City and Zip):</b> 311 S. Center Ave, Room 102, Jefferson, WI 53549	

This is to notify the State Historical Society of Wisconsin and the Wisconsin Public Records Board that the county named above has officially adopted the Register of Deeds Records Retention Schedule.

<b>Name of appropriate authorizing official</b> (County Board Chairperson or County Administrator/Executive): Benjamin L. Lehman	<b>Title:</b> County Administrator
<b>Signature of appropriate authorizing official:</b> 	<b>Date signed (mo/day/yr):</b> 07/03/14

<b>Register of Deeds (please print):</b> Staci M. Hoffman	
<b>Signature of Register of Deeds:</b> 	<b>Date signed:</b> 05/24/2018

The Wisconsin Public Records Board and the State Historical Society of Wisconsin acknowledge your Notification of Adoption of the Register of Deeds Retention Schedule. You are hereby authorized to retain, transfer, and dispose of records as indicated on the schedule.

<b>State Archivist:</b> 	<b>Date Signed:</b> 7/18/18	<b>Executive Secretary-PRB:</b> 	<b>Date Signed:</b> 8/15/18
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Restrictions on records destruction contained in s. 19.35(5), WI Statutes (Open Records Law), apply prior to destruction. No records should be destroyed if a request for inspection or copying is pending or if litigation involving these records has commenced.

# JEFFERSON COUNTY RECORDS RETENTION/DISPOSITION SCHEDULE

## GENERAL SCHEDULE [RECORDS COMMON TO MOST COUNTY AGENCIES, BOARDS, COMMISSIONS, COMMITTEES, DEPARTMENTS, OR OFFICES]

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	<b>General Schedules (records typically found throughout the county)</b>				<b>Department Where Record is Located</b>	
	Accounts Payable (and supporting documents)	CR + 7 years		Waived	Department Head	Balance owed to a creditor.
	Accounts Receivable (and supporting documents)	CR + 3 years		Waived	Department Head	Balanced owed by a debtor.
	Accrued Paid Leave Credit	S		Waived	Department Head	Compensatory time, PTO, sick, vacation or other.
	Agendas	CR + 1 year		Waived	Department Head	
	Agreements	7 years after last effective date thereof	§59.52(4)(a)10 Wis. Stats.	Waived	Department Head	
	Annual Reports	CR + 3 years		Notify	Department Head	
	Any record subject to audit, claim, or litigation.	Until permission to destroy is obtained from Corporation Counsel			Department Head	
	Artwork / Print Masters	S		Waived	Department Head	
	As-Built Drawings	Life of Project		Notify	Department Head	
	Audit (external)	CR + 7 years		Waived	Department Head	This includes any records associated with an audit.
	Audit (internal)	S		Waived	Department Head	This includes any records associated with an audit.
	Bank Deposits	CR + 7 years		Waived	Department Head	
	Bank Statements / Reconciliations	CR + 7 years	§59.61 Wis. Stats.	Waived	Department Head	
	Boilerplate Forms	S		Waived	Department Head	
	Blueprints (county facilities)	S		Waived	Department Head	Retain until and unless superseded by as-built drawing.
	Budget (county)	CR +3 years		Waived	Department Head	Includes all records required under §65.90 Wis. Stats.
	By-Laws	S		Waived	Department Head	
	Calendars	S		Waived	Department Head	
	Cash Register Tapes	CR + 7 years		Waived	Department Head	
	Chart of Accounts (Object Codes)	CR + 3 years		Waived	Department Head	
	Checks (cancelled / voided)	*CR + 7 years	§59.52(4)(a)16 Wis. Stats.	Waived	Department Head	
	Checks (duplicates, registers and/or logs)	CR + 7 years		Waived	Department Head	



<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Citations (copies)	CR + 2 years		Waived	Department Head	
	Claims Made (general liability and property damage)	EVT + 3 years; EVT = Closure		Waived	Department Head	
	Claims Paid (general liability and property damage)	EVT + 3 years; EVT = Payment	§59.52(4)(a)9 Wis. Stats.	Waived	Department Head	Includes papers supporting such claims
	Code of Ethics (county)	S		Waived	Department Head	
	Computer Printouts	S		Waived	Department Head	
	Construction Plans (county facilities)	Life of Structure		Notify	Department Head	
	Continuity of Operation (CCOP Plans)/ Continuity of Government (COG) Plans	S		Waived	Department Head	
	Contracts	7 years after last effective date thereof	§59.52(4)(a)10 Wis. Stats.		Department Head	
	Correspondence (general)	CR + 3 years		Waived	Department Head	
	Directory Information	S		Waived	Department Head	
	Fixed Assets	EVT + 1 year; EVT = Disposition		Waived	Department Head	Land, land improvements, buildings, machinery and equipment, and construction in progress.
	Fund Transfers	FIS + 4 years		Waived	Department Head	
	Grant Information (application, denial, award, agreement, financial reports, and supporting documentation)	EVT + 4 years; EVT = Notification of Denial or Grant Completion		Waived	Department Head	Unless otherwise specified in the terms and conditions of the award.
	Indexes	S		Waived	Department Head	Until superseded or as long as the records they index exist.
	Insurance Policies (to which the county is a party)	7 years after last effective date thereof	§59.52(4)(a)10 Wis. Stats.	Waived	Department Head	Consider permanent retention, as may be relevant for current claims
	Inventories (equipment and furnishings)	S		Waived	Department Head	
	Invitations to Bid/Requests for Proposal	7 years after completion of the work	§59.52(4)(a)10 Wis. Stats.	Waived	Department Head	Includes instructions, specifications, proof of advertisement, successful bids/proposals, agreements, contracts, and any related records
	Journal Entries/General Ledger	FIS + 4 years		Notify	Department Head	
	Leases	7 years after last effective date thereof	§59.52(4)(a)10 Wis. Stats.	Waived	Department Head	
	Ledger Card Reports, EOM (BAS)	S		Waived	Department Head	
	Ledger Card Reports, EOY (BAS)	S		Waived	Department Head	
	Legal Opinions	Permanent		Waived	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Mailing Lists	S		Waived	Department Head	
	Maintenance Service Request Form	EVT: EVT = Project Completion		Waived	Department Head	
	Manual Warrants	CR + 1 year		Waived	Department Head	
	Manuals (equipment)	Life of Asset		Waived	Department Head	
	Master Project Files	CR + 20 years		Waived	Department Head	
	Material Safety Data Sheets	EVT + 30 years: EVT = Date substance received	§101.583(1)(a) Wis. Stats.	Waived	Department Head	Toxic substance information requirements
	Minutes (commissions, committees and boards)	CR + 3 years		Notify	Department Head	Original minutes only
	Ordinances and Resolutions (enacted/adopted)	S		Notify	Department Head	
	Organizational Charts	S		Waived	Department Head	
	Payment Vouchers	FIS + 4 years		Waived	Department Head	
	Payroll Records	CR + 3 years		Waived	Department Head	FLSA
	Personnel (expenses)	S		Waived	Department Head	
	Personnel (files)	EVT + 7 years: EVT = Separation from employment		Waived	Department Head	C, PII
	Personnel (grievances)	EVT + 7 years: EVT = Case closed		Waived	Department Head	
	Personnel (job descriptions)	S		Waived	Department Head	
	Personnel (performance evaluations)	EVT + 7 years: EVT = Separation from employment		Waived	Department Head	C, PII
	Personnel (recruitment and selection)	1 year from date of personnel action		Waived	Department Head	Includes advertisements, notices, applications, tests/results. C, PII
	Policy & Procedures Manual	S		Waived	Department Head	
	Professional Affiliations/Associations	S		Waived	Department Head	
	Purchase Orders	S		Waived	Department Head	
	Purchase Requisitions	S		Waived	Department Head	
	Receipts (Clerk's copy of Treasurer's)	CR + 4 years; or until audited, whichever is earlier	§59.52(4)(a)(12) Wis. Stats	Waived	Department Head	
	Receipts (general)	CR + 1 year	§59.52(4) Wis. Stats	Waived	Department Head	
	Receipts (money collected or received)	CR + 3 years: or until audited, whichever is earlier	§59.61(1) Wis. Stats.	Waived	Department Head	
	Records Management Findings & Recommendations	S		Waived	Department Head	
	Records Retention Schedules	S		Waived	Department Head	WPRB approval "sunset" after 10 years

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Reference Materials (books, magazines, pamphlets, brochures, newsletters, etc.)	S		Waived	Department Head	Retain as long as administratively useful
	Reports (routine)	S		Waived	Department Head	
	Service Receipts	CR + 2 years		Waived	Department Head	
	Strategic Plan (county)	S		Waived	Department Head	
	Studies - final draft	CR + 7 years		Notify	Department Head	
	Supply Orders	EVT: EVT = Order filled, invoiced, & paid		Waived	Department Head	
	Surveillance Recordings (facility/non-evidentiary)	CR + 121 Days	§893.80 Wis. Stats.	Waived	Department Head	
	Survey	CR + 3 years		Waived	Department Head	
	Telephone Logs/Message Slips/Voice Mail	S		Waived	Department Head	Any routine documentation of incoming or outgoing calls. Only retain as long as administratively necessary.
	Telephone Service Request Form	EVT: EVT = Project Completion		Waived	Department Head	
	Tickler Files (follow-up)	S		Waived	Department Head	
	Tracking Records (activity)	CR + 1 year		Waived	Department Head	
	Training	S		Waived	Department Head	Specific requirements may require that particular records of training be kept for a longer period.
	Vendor Information	S		Waived	Department Head	
	Vouchers / Order Register	*CR + 7 years		Waived	Department Head	
	Warranty Records	Life of asset or end of warranty, whichever occurs first		Waived	Department Head	
	Worker's Compensation Claims	EVT + 12 years: EVT = Later of injury, claim or closure	Ch. 102 Wis. Stats.	Waived	Department Head	
* Time reduced to two (2) years if the original records are maintained in the Clerk or Treasurer's office.						

	<b>Central Services (Buildings and Grounds)</b>					
	Access Control List (e.g., Key, Swipe Card, Key Fob, and/or Access Code)	P/S		Waived	Department Head	
	Buildings, Facilities & Grounds Data	S		Waived	Department Head	
	Construction Project Planning, Proposal, & Administration Records	7 years after project completion		Waived	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Construction Submittals (e.g., Shop Drawings, Samples, & Product Data)	P		N/A	Department Head	
	Environmental Health & Safety Records	CR + 7 years		Waived	Department Head	
	Equipment, Systems, & Vehicles (e.g., Purchase Information, Instruction Manuals, Maintenance Agreements, Maintenance Logs, Warranties)	Life of Equipment, System, or Vehicle		Waived	Department Head	
	Incident Reports	CR + 3 years		Waived	Department Head	
	<b>Public Works Contracts</b>					
	Affidavit of organization & authority, successful bidders	EVT + 7 years: EVT = Project completion		Waived	Department Head	
	Affidavit of organization & authority, unsuccessful bidders	CR + 2 years		Waived	Department Head	
	Bid Tabulations	EVT + 7 years: EVT = Project completion		Waived	Department Head	
	Bidder's Proof of Responsibility, successful bidders	CR + 7 years		Waived	Department Head	
	Bidder's Proof of Responsibility, unsuccessful bidders	CR + 2 years		Waived	Department Head	
	Bids, successful	EVT + 7 years: EVT = Project completion		Waived	Department Head	
	Bids, unsuccessful	CR + 2 years		Waived	Department Head	
	Notice to Contractors, successful bidders	CR + 7 years		Waived	Department Head	
	Notice to Contractors, unsuccessful bidders	CR + 2 years		Waived	Department Head	
	Performance Bond	EVT + 7 years: EVT = Project completion		Waived	Department Head	
	<b>Facilities Management</b>					
	Asbestos Files	Permanent	29 CFR 1910.20	N/A	Department Head	
	Cleaning Log	CR + 1 year		Waived	Department Head	
	Condemned Homes on County Property / Burning of	Permanent		N/A	Department Head	
	County Building Files	EVT + 3 years: EVT = Superseded		Waived	Department Head	
	Flood File (Administration Center)	Permanent		N/A	Department Head	
	Inspection Cleaning Evaluation Reports	CR + 2 years		Waived	Department Head	
	Inspection Reports (Elevator, etc.)	CR + 7 years		Waived	Department Head	
	Key Number Listing	Permanent		N/A	Department Head	
	Maintenance Job Order Data Sheet	CR + 1 year		Waived	Department Head	
	Maintenance Key Daily Sign Out Sheet	S		Waived	Department Head	
	Maps - Original Drawings	Permanent		N/A	Department Head	
	Natural Gas Usage Manual	S		Waived	Department Head	
	Parks, substations & highway building survey reports / yearly	CR + 10 years		Waived	Department Head	
	Payroll Time Cards (Maintenance)	CR + 7 years		Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Project Files	Permanent		N/A	Department Head	
	Project Log	Permanent		N/A	Department Head	
	Record of Transmittal	CR + 3 years		Waived		
	Utility Computer Printouts	S		Waived	Department Head	
	<b>Child Support</b>					
	Administrative Cost Claims	EVT + 3 years: EVT = Submission of last expenditure report	45 CFR 92.42 (b)(1) & Wis. DCF	Waived	Department Head	Includes supporting documentation (e.g., costs and revenues)
	Case Records	EVT + 7 years: EVT = Closure		Waived	Department Head	C, PII
	Child Support Divorce	EVT + 7 years: EVT = Closure		Waived	Department Head	
	Client Assistance (out of county)	CR + 7 years		Waived	Department Head	
	Client Logs	S		Waived	Department Head	
	Expenditure Reports & Supporting Documentation	CR + 3 years	45 CFR 74.20 - 74.25	Waived	Department Head	
	IRS Records List	EVT + 7 years: EVT = Closure		Waived	Department Head	
	Misdemeanor and Felony Non-Support Files	EVT + 7 years: EVT = Closure		Waived	Department Head	
	Paternity Files, post judgments	EVT + 7 years: EVT = Closure		Waived	Department Head	
	Paternity Files, pre-judgments, dismissed	CR + 3 years		Waived	Department Head	
	Paternity Files, pre-judgments, not pursued	CR + 3 years		Waived	Department Head	
	Reciprocal Support Cases (Interstate cases - i.e., UIFSA, URESA)	EVT + 7 years: EVT = Closure		Waived	Department Head	
	Records of Required Client Notification	CR + 3 years	46 CFR 74.20 - 74.25	Waived	Department Head	
	Statistical Reports & Supporting Documentation	CR + 3 years	45 CFR 74.20 - 74.25	Waived	Department Head	
	Warrants & Capias	EVT + 3 years: EVT = Vacated, Served, or Closed		Waived	Department Head	
	<b>Corporation Counsel</b>					
	Case files, litigation	EVT + 3 years: EVT = Closure or when appeal time has run, whichever is longer or per SCR		Waived	Department Head	C
	Case files, non-litigation	CR+3 years		Waived	Department Head	
	CHIPS (Child in Need of Protective Services) Juvenile Records	EVT + 2 years: EVT = Child's 18th Birthday		Waived	Department Head	C
	CHIPS (Child in Need of Protective Services) Petitions	S		Waived	Department Head	C
	Department Files	CR + 3 years		Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Dismissals - 51.45	CR + 3 years		Waived	Department Head	
	Guardianship Files	EVT + 7 years: EVT = Termination of Guardianship		Waived	Department Head	C
	Lawsuits and Habeas Corpus	EVT + 3 years: EVT = Closure or when appeal time has run, whichever is longer or per SCR		Waived	Department Head	
	Legal Fees, Outside Counsel	EVT + 5 years: EVT = No		Waived	Department Head	
	Legal Memoranda	Permanent		P	Department Head	C
	Legal Opinions	Permanent		P	Department Head	C
	Liability Claims	EVT + 7 years: EVT = Expiration		Waived	Department Head	
	Mental Commitment Cases	EVT + 3 years: EVT = Closed		Waived	Department Head	C
	Ordinance Cover Sheets	EVT + 3 years: EVT = Board Approval		Waived	Department Head	
	Parks and Land Use and Environmental Ordinance Enforcement Files	3 years after resolution		Waived	Department Head	
	Real Estate Closing Files	Permanent		N/A	Department Head	
	Termination of Parental Rights (TPRs)	EVT + 45 days: EVT = Child's 19th Birthday		Waived	Department Head	C
	Truancy Referrals	EVT + 1 year: EVT = Child's 18th Birthday		Waived	Department Head	C

	Countryside				Department Where Record is Located	
	HIPAA Compliance	6		Waived	Department Head	
	Absence	6		Waived	Department Head	
	Applications (Non-employee)	2		Waived	Department Head	
	Employee History	1AT		Waived	Department Head	
	FMLA Documents	3		Waived	Department Head	
	Individual Earnings	6AT		Waived	Department Head	
	Classifications/Position Descriptions	P		Waived	Department Head	
	Medical	30AT		Waived	Department Head	
	OSHA	30AT		Waived	Department Head	
	Payroll	10 years		Waived	Department Head	
	Payroll Documents Subject to IRS Audit	10+		Waived	Department Head	
	Performance Evaluations	6AT		Waived	Department Head	
	Personnel Policies	P		Waived	Department Head	
	Rate Schedules, Benefit or Pension Summaries	6		Waived	Department Head	C
	Age Discrimination Act Documents	1AT		Waived	Department Head	
	Civil Rights Act, ADA Documents	1AT		Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Equal Pay Act Documents	6		Waived	Department Head	
	Social Security Reports, W-4 Forms, W-2 Forms	6		Waived	Department Head	
	Staffing Schedules/Vacation Listings	10 years		Waived	Department Head	
	Union Contracts	P		Waived	Department Head	
	<b>Worker's Compensation Documents</b>	12		Waived	Department Head	
	I-9 Forms	3+		Waived	Department Head	
	Bank Deposits, Cancelled Checks, Reconciliations	3		Waived	Department Head	
	<b>Bank Statements</b>	8		Waived	Department Head	
	Cash Receipts, Deposits, Receipt Books	10		Waived	Department Head	
	Correspondence (Credit, Collections, Insurance)	6		Waived	Department Head	
	General Ledger	P		Waived	Department Head	
	Invoices (AP and AR)	6		Waived	Department Head	
	Journals & Ledgers (General)	P		Waived	Department Head	
	MA Level of Care Approvals	3		Waived	Department Head	
	MA Eligibility, Billings to MA, Medicare	6		Waived	Department Head	
	Medicare/Medicaid Cost Reports	7		Waived	Department Head	
	Medicare EOMB's/MA Ras	7		Waived	Department Head	
	Medicare Secondary Payer	10		Waived	Department Head	
	Petty Cash	3		Waived	Department Head	
	Resident Bank & Fund Closing Statements	3		Waived	Department Head	
	<b>Withdrawal Slips/Logs (Residents)</b>	10		Waived	Department Head	
	Food Costs	5		Waived	Department Head	
	Meal Counts	5		Waived	Department Head	
	Manus, Therapeutic Diets	3		Waived	Department Head	
	Blueprints	P		Waived	Department Head	
	Building Maintenance & Repair	10		Waived	Department Head	
	Calibration	6		Waived	Department Head	
	Equipment, FPA Standards	LOP+6		Waived	Department Head	
	Equipment Maintenance	5		Waived	Department Head	
	Inspection – Building & Grounds	3		Waived	Department Head	
	Maintenance Log	6		Waived	Department Head	
	Work Orders	3		Waived	Department Head	
	Appointment Schedules	3		Waived	Department Head	
	Communicable Disease Reports	3		Waived	Department Head	
	Controlled Substance Records (Inventory & Orders)	3		Waived	Department Head	
	Correspondence – Resident	6		Waived	Department Head	
	Daily Census Reports	6		Waived	Department Head	
	Disease Index, Resident Index, Admission/Discharge	P		Waived	Department Head	
	Incident Reports	3		Waived	Department Head	
	In-service, Orientation Programs, Attendance	3		Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	MDS Data Collection	18M		Waived	Department Head	
	Narcotics, Key Counts, Pharmacy orders	18M		Waived	Department Head	
	Purchase Orders, Receipts for Resident personal Use	6		Waived	Department Head	
	Resident Listings	3		Waived	Department Head	
	Resident Medical and Financial	7		Waived	Department Head	
	Resident Sign-out	1		Waived	Department Head	
	<b>Economic Support and Workforce Development</b>					
	Public Assistance Case Records and Other Record Materials (General)	EVT + 3 years; EVT = Date of Closing	Ch. 49 & §59.52(4)(a) 18 Wis. Stats., Ch. DCF 121 Wis. Adm. Code, Income Maintenance Manual, and Wis. DCF and/or Wis. DHS directives	Waived	Department Head	Face sheet or similar record of each case and a financial record of all payments for each aid account must be preserved in accordance with rules adopted by Wis. DCF and/or Wis. DHS. C, PII
	Public Assistance - Divestment & Asset Allocation (Medicaid), Fraud, Intentional Program Violation, Overpayment, and Quality Control Review	EVT + 3 years; EVT = When the issues have been resolved or Wis. DCF and/or Wis. DHS instructs that the records may be destroyed, whichever is earlier.	Ch. 49 & §59.52(4)(a) 18 Wis. Stats., Ch. DCF 121 Wis. Adm. Code, Income Maintenance Manual, and Wis. DCF and/or Wis. DHS directives	Waived	Department Head	C, PII

\*\*\*Records may not be subject to the foregoing retention requirements if scanned in the Electronic Case File (ECF), Client Assistance for Reemployment and Economic Support (CARES) or other Wis. DCF and/or Wis. DHS system. It is recommended that paper documents be retained for one week after scanning.

	<b>Emergency Management (Ch. 323 Wis. Stats.)</b>				Department Head	
	Claims Arising During State of Emergency	CR + 121 days	§§257.03 and 893.82 Wis. Stats.	Waived	Department Head	
	Declaration of Emergency (Proclamation, Resolution and/or Ordinance)	CR + 7 years	§§323.11 and .14(4) Wis. Stats.	Waived	Department Head	
	Emergency Management Plan	5	§323.14(1) Wis. Stats.	Waived	Department Head	
	Emergency Planning Grants	CR + 7 years	§323.61 Wis. Stats.	Waived	Department Head	
	Hazardous Substance Information	CR + 7 years	§323.60 Wis. Stats., C.E.R.C.L.A., E.P.C.R.A., S.A.R.A.	Waived	Department Head	



<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Local Emergency Planning Committee	S	§59.54(8) Wis. Stats.	Waived	Department Head	
	Local Emergency Response Team - Reimbursement Claim	EVT + 5 years; EVT = Reimbursement	§WEM 6.09 Wis. Adm. Code	Waived	Department Head	Must give Wis. DEM 60-days written notice before any such record may be destroyed
	Mutual Assistance - State of Emergency	CR + 7 years	§66.0314(1)(a) Wis. Stats.	Waived	Department Head	
	Worker's Compensation Claim	EVT + 12 years; EVT = Occurrence	Ch. 102 and §323.40 Wis. Stats.	Waived	Department Head	Tied to worker's compensation claim statute of limitations

	<b>County Administrator (§59.18 Wis. Stats.)</b>					
	<b>Administration</b>				Department Head	
	Board and Commission Appointments/Confirmation (if required)	S	§59.17(2)(c) and .18(2)(c) Wis. Stats.	Waived	Department Head	
	Department Head Appointments/Confirmation (if required)	S	§§59.17(2)(b), (2)(br) and .18(2)(b) Wis. Stats.	Waived	Department Head	
	Message to the Board	CR + 7 years	§§59.17(5) and 59.18(5) Wis. Stats.	Waived	Department Head	Only if communicated to the county board in writing.
	Resolution or Petition and Referendum Creating the Office	S	§§59.17(1) and .18(1) Wis. Stats.	Waived	Department Head	
	<b>Economic Development</b>				Department Head	
	Annual Grant Application	CR + 3 years		Waived	Department Head	
	Audits, community block grant	CR + 7 years	24 CFR 570.502(a)(16)	Waived	Department Head	
	Census Books	S		Waived		
	Environmental Reviews	CR + 7 years		Notify	Department Head	
	Federal Regulations	S		Waived	Department Head	
	Grant Awards	CR + 7 years	24 CFR 570.502(a)(16)	Waived	Department Head	
	Home Regulations	S		Waived	Department Head	
	HUD Disaster Recovery Initiative Fund Files	CR + 5 years		Waived	Department Head	
	HUD Grantee Performance Reports	CR + 7 years	24 CFR 570.502(a)(16)	Waived	Department Head	
	Labor Standard Projects	CR + 7 years	24 CFR 570.502(a)(16)	Waived	Department Head	
	Labor Standard Wage Files	CR + 7 years	24 CFR 570.502(a)(16)	Waived	Department Head	
	Sub Grantee Project Files - CDBG (Community Development Block Grant)	CR + 7 years	24 CFR 570.502(a)(16)	Waived	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Sub Grantee Project Files - Home	CR + 7 years	24 CFR 570.502(a)(16)	Waived	Department Head	
	<b>Senior Services</b>					
	Adult Day Care Records	CR + 3 years		Waived	Department Head	C
	Adult Day Care Tracking Statistics	EVT + 3 years: EVT = Audited		Waived	Department Head	
	Area Agency on Aging Reports - includes nutritional meal program summary	CR + 7 years		Waived	Department Head	
	Benefit Specialist Client Files	EVT + 7 years: EVT = File Closed	s. 46.81 & 59.52 & HSS 245.03	Waived	Department Head	C
	Benefit Specialist Report	S	s. 46.81	Waived	Department Head	C
	Client Assessments for Home Delivered Meals and Supportive Services	CR + 3 years		Waived	Department Head	C
	Client Donation Deposits	CR + 7 years		Waived	Department Head	
	Client Files - includes complaints, HDM assessments and pre-authorizations	EVT + 7 years: EVT = File Closed	s. 59.52	Waived	Department Head	C
	Client Nutrition Site Changes, site counts and daily meal counts	CR + 4 years		Waived	Department Head	
	Client Statements (Revenue Received)	CR + 3 years		Waived	Department Head	
	Commission on Aging - business related materials	CR + 7 years		Waived	Department Head	
	Complaint Grievance File	CR + 3 years		Waived	Department Head	
	Congregate Billings	CR + 3 years		Waived	Department Head	
	Congregate Participant Logs Book	CR + 7 years		Waived	Department Head	
	Congregate Registration Forms	CR + 7 years		Waived	Department Head	
	Contract Monitoring Files	CR + 7 years		Waived	Department Head	
	Contract Provider Billing Reports, invoices	CR + 7 years		Waived	Department Head	
	Contracts Not Related to Purchasing	CR + 3 years		Waived	Department Head	
	Day Care Client Billings	CR + 7 years		Waived	Department Head	
	Elder Abuse Reports	CR + 7 years	s. 46.90	Waived	Department Head	
	Factors Database Program	S		Waived	Department Head	
	Grant Applications	EVT + 4 years: EVT =		Waived	Department Head	
	Grant Task Force	S		Waived	Department Head	
	Greeter Program Files	CR + 3 years		Waived	Department Head	
	Home Delivered Meals	CR + 7 years		Waived	Department Head	
	Home Delivered Meals, monthly computer printout reports	CR + 3 years		Waived	Department Head	
	Home Delivered Meals, tracking index cards	CR + 7 years	s. 46.85	Waived	Department Head	
	Home Delivered Meals, volunteer mileage reports	CR + 7 years	s. 46.85	Waived	Department Head	
	Home Delivery Meals, client charge log, daily activity log, and daily vendor order sheet	CR + 7 years		Waived	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	ID Applications	CR + 5 years		Waived	Department Head	
	ID Receipts	CR + 5 years		Waived	Department Head	
	ID Reconciliation Book	CR + 5 years		Waived	Department Head	
	Information & Assistance (I & A) Files (EOY)	EVT + 7 years: EVT = Audited		Waived	Department Head	C
	Information & Assistance Phone Logs	CR + 7 years		Waived	Department Head	C
	Information Systems Capital Project Documents	CR + 2 years		Waived	Department Head	
	Legal Action Files (Legal Action of Wisconsin)	S		Waived	Department Head	
	Long Term Redesign Project	CR + 4 years		Waived	Department Head	
	Medicare Vans, weekly billings	CR + 3 years	s. 85.21	Waived	Department Head	
	Nutrition Checks	CR + 3 years		Waived	Department Head	
	Nutrition Program Records	CR + 3 years		Waived	Department Head	
	Nutrition Site, progress reports	CR + 3 years		Waived	Department Head	
	Nutrition Site, quality control sheets	CR + 3 years		Waived	Department Head	
	Nutrition Site, registrations	CR + 1 year		Waived	Department Head	
	Preauthorization's, Service	EVT + 1 years: EVT =		Waived	Department Head	
	Program Monitor Evaluation (PME) Billing Reports, invoices	EVT + 7: EVT = Audited		Waived	Department Head	
	Project Files, special events	CR + 7 years		Waived	Department Head	
	Reports, specialized transportation / other	CR + 5 years		Waived	Department Head	
	Senior Center Listing	CR + 5 years		Waived	Department Head	
	Senior Dining Quality Control Sheets	CR + 7 years		Waived	Department Head	
	Senior Dining Supply Usage Reports	CR + 7 years		Waived	Department Head	
	Senior ID Log Book	CR + 5 years		Waived	Department Head	
	Shared taxi Monthly Report	S		Waived	Department Head	
	Statistics, operational and cost	CR + 5 years		Waived	Department Head	
	Support Group and Doctors List	CR + 1 year		Waived	Department Head	
	Taxi Program Analysis	CR + 3 years		Waived	Department Head	
	Taxi Vouchers	EVT + 3 years: EVT = Audited	s. 85.21	Waived	Department Head	
	Title XIX Billing Statements	CR + 7 years		Waived	Department Head	
	Transit Data, Historical, specialized	EVT + 7 years: EVT = Settlement	s. 85.21	Waived	Department Head	
	Transportation Contracts	CR + 3 years	s. 85.21	Waived	Department Head	
	Volunteer Acknowledgement of Confidentiality	EVT + 3 years: EVT = Termination		Waived	Department Head	
	Volunteer Card File	CR + 7 years	s. 46.85	Waived	Department Head	
	Volunteer Driver Agreements	EVT + 3 years: EVT = Termination		Waived	Department Head	
	Volunteer Elder Reach Files	CR + 3 years	s. 46.85	Waived	Department Head	
	Volunteer Friendly Visitors Files	EVT + 3 years: EVT = Termination		Waived	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Volunteer Monthly Reports	CR + 7 years	s. 46.85	Waived	Department Head	
	Volunteer Registration Forms - Includes Confidentiality Driver's Statements	CR + 7 years		Waived	Department Head	
	Volunteer Staff Log Book	S		Waived	Department Head	

	<b>Finance</b>					
	Balancing Report	FIS + 4 years		Waived	Department Head	
	Bond & Coupon Records Book, general obligation bonds	EVT + 30 years: EVT = Bond issue expiration or following payment of all outstanding matured bonds, notes, coupons, whichever is later		Waived	Department Head	
	Canceled Bonds, Coupons, & Promissory Notes	EVT: EVT = Audited		Waived	Department Head	
	Copies of Notices of Tax Apportionment Sent to Local Taxing Districts by County Clerk	FIS + 3 years	§59.52(4)(a)2. Wis. Stats.	Waived	Department Head	
	Deferred Compensation Records	EVT + 8 years: EVT = End of Service		Waived	Department Head	
	Equipment & Furnishings Inventories	S		Waived	Department Head	
	Garnishment Records	FIS + 7 years		Waived	Department Head	
	General Ledger	FIS + 7 years		Notify	Department Head	
	General Ledger, Trial Balance	FIS + 7 years		Waived	Department Head	
	Illegal Tax Certificates Charged Back to Local Tax Districts	EVT + 3 years: EVT = Charging Back	§59.52(4)(a)6. Wis. Stats.	Waived	Department Head	
	Insurance Records	7 years after the last effective date thereof	§59.52(4)(a)10. Wis. Stats.	Waived	Department Head	
	Investment Records	FIS + 6 years		Waived	Department Head	
	Notices of Tax Apportionment from Secretary of State	FIS + 3 years	§59.52(4)(a)1. Wis. Stats.	Waived	Department Head	
	Payroll Registers, Other Payroll Report, & Social Security & Retirement Earnings Report	FIS + 7 years		Waived	Department Head	
	Retirement Records	EVT + 8 years: EVT = End of Service		Waived	Department Head	
	Time cards, Attendance Records, Salary Schedule	FIS + 7 years		Waived	Department Head	
	Treasurer Cash	FIS + 7 years		Waived	Department Head	
	Unemployment Compensation Payment Records	FIS + 3 years		Waived	Department Head	
	Withholding Allowance Certificates, Employee Wage & Tax Statements, & Other Tax Records	FIS + 7 years		Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
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	<b>Health Department</b>					
	<b>Administrative</b>					
	Accounts Receivable Client Records	EVT + 10 years: EVT = Audited		Waived	Department Head	C, PII
	Agency Evaluations	CR + 7 years	§19.21 Wis. Stats.	Waived	Department Head	
	Agency Goals, objectives, short & long term strategic plans	CR + 7 years	§. Stats.	Waived	Department Head	
	Audit Reports, Vendor	CR + 7 years		Waived	Department Head	
	Background Checks	CR + 7 years		Waived	Department Head	
	Bankruptcy Reports	CR + 7 years		Waived	Department Head	
	CARS (Community Aids Reporting System) Reports	Permanent		N/A	Department Head	
	Cash Grant Vouchers	CR + 7 years		Waived	Department Head	
	Certification of Destruction (Records)	Permanent		N/A	Department Head	
	Daily Activities Report	CR + 7 years	§. Stats.	Waived	Department Head	
	Daily Deposit Spreadsheets	CR + 7 years		Waived	Department Head	C, PII
	Employee Expense Accounts	CR + 7 years		Waived	Department Head	
	Evening Security Logs	CR + 3 Months		Waived	Department Head	
	Fiscal Records, Billing, Budget	CR + 7 years	§. Stats.	Waived	Department Head	
	Grant Reconciliation Working Papers	Permanent		N/A	Department Head	
	Grants	EVT + 4 years; EVT = Notification of Denial or Grant		Waived	Department Head	
	HIPAA Documentation (Health Insurance Portability and Accountability Act)	CR + 7 years	HIPAA	Waived	Department Head	C, PII
	Hospital Fiscal Survey	Permanent		N/A	Department Head	
	Incident / Injury Reports	CR + 7 years	§. Stats.	Waived	Department Head	C, PII
	Inventories, facility and equipment	CR + 7 years	§. Stats.	Waived	Department Head	
	Inventory, or non-expendable personal property	EVT + 7 years: EVT = Property disposed of	§. Stats.	Waived	Department Head	
	Medicare Cost Report	Permanent		N/A	Department Head	
	Mission Statement, Philosophy, Purpose	CR + 7 years	§. Stats.	Waived	Department Head	
	Patient Billing Activity Logs	CR + 7 years		Waived	Department Head	C, PII
	Policies and Procedures (Program related)	CR + 7 years	§. Stats.	Waived	Department Head	
	Policies and Procedures (Records related)	EVT: EVT = Superseded or Record Series no longer Exists		Waived	Department Head	
	Press Releases	CR + 1 year		Waived	Department Head	
	Purchase Orders EDS (Electronic Data Storage)	CR + 7 years		Waived	Department Head	
	Reconciliation Working papers	Permanent	HHS 54.06 (2)(a)(6)	N/A	Department Head	
	State Reports (942/943)	Permanent		N/A	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Taped meeting minutes	EVT + 90 days: EVT = Approval date & publication	§. Stats.	Waived	Department Head	
	W.I.C. Case Files	FIS + 3 years	7 CFR 246.25	Waived	Department Head	C
	W.I.C. State Reports	CR + 3 years		Waived	Department Head	C
	<b>Client and/or Family Care</b>					
	Agency Program Evaluation	CR + 7 years	§. Stats.	Waived	Department Head	
	Birth Certificate Information	EVT + 1 year: EVT = Receipt of Copy	§69.20(3) Wis. Stats.	Waived	Department Head	C
	Care Coordination: Adult	CR + 7 years	§19.21 Wis. Stats.	Waived	Department Head	
	Care Coordination: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21 Wis. Stats.	Waived	Department Head	
	Child Long Term Support - Autism Records	EVT + 7 years: EVT = Case		Waived	Department Head	
	Client Listing	CR + 1 Month		Waived	Department Head	C
	Client Record / Patient Care: Adult	CR + 7 years	§19.21 Wis. Stats.	Waived	Department Head	C
	Client Record / Patient Care: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21 Wis. Stats.	Waived	Department Head	C
	Clinic Record, blood pressure forms	CR + 7 years		Waived	Department Head	C
	Complaint Investigation Record	CR + 7 years		Waived	Department Head	C
	Family Care Record: Adult	CR + 7 years	§19.21 Wis. Stats.	Waived	Department Head	C
	Family Care Record: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21 Wis. Stats.	Waived	Department Head	C
	Health Check / Well Child: Adult	CR + 7 years	§19.21 Wis. Stats.	Waived	Department Head	C
	Health Check / Well Child: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21 Wis. Stats.	Waived	Department Head	C
	Health Fair Records	CR + 7 years		Waived	Department Head	C
	Home Care Record	EVT + 6 years: EVT = The month the cost report is filed with the intermediary, maintain even if program is discontinued		Waived	Department Head	C
	Lead Screens	CR + 7 years		Waived	Department Head	C
	Monthly Clinic Statistic Report	CR + 1 year		Waived	Department Head	
	Monthly Nurses Calendar	CR + 1 year		Waived	Department Head	C
	Short Term Record: Adult	CR + 7 years	§19.21 Wis. Stats.	Waived	Department Head	
	Short Term Record: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21 Wis. Stats.	Waived	Department Head	
	<b>Communicable Disease Records</b>					
	Clinic Record, STD Clinic	CR + 7 years		Waived	Department Head	C, PII

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Communicable Disease Outbreak Records [DOH 4142 (Rev. 8/860 & is complete DOH 9081] (Original to State Epidemiologist)	EVT: EVT = Investigation is complete		Waived	Department Head	C, PII
	Communicable Disease Reports (4151) - Local Copy (Original to State Epidemiologist): Adult	CR + 7 years		Waived	Department Head	C, PII
	Communicable Disease Reports (4151) - Local Copy (Original to State Epidemiologist): Minor	EVT + 5 years: EVT = Minor reaches 18 years of age		Waived	Department Head	C, PII
	Hep. B / TB Case Records	EVT + 30 years: EVT = Severance		Waived	Department Head	C, PII
	Immunization Administration Record	Permanent	National Childhood Injury Act of 1986, s 2125 PHS Act at 42 U.S.C. s. 300aa - 25 (Supp. 1987)	N/A	Department Head	C, PII
	Immunization Record: Adult	CR + 7 years	§19.21 Wis. Stats.	Waived	Department Head	C, PII
	Immunization Record: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21 Wis. Stats.	Waived	Department Head	C, PII
	Referral Listing	CR + 7 years		Waived	Department Head	C, PII
	Signature of Person to Receive Vaccine or Person Authorized to Make Request for Immunization: Adult	CR + 10 years		Waived	Department Head	C, PII
	Signature of Person to Receive Vaccine or Person Authorized to Make Request for Immunization: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age		Waived	Department Head	C, PII
	STD Report (4343) - Local Copy (Original to State Epidemiologist): Adult	CR + 7 years		Waived	Department Head	C, PII
	STD Report (4343) - Local Copy (Original to State Epidemiologist): Minor	EVT + 5 years: EVT = Minor reaches 18 years of age		Waived	Department Head	C, PII
	<b>Community Education</b>					
	Curriculum	CR + 7 years		Notify	Department Head	
	Educational Materials	CR + 7 years		Notify	Department Head	
	Evaluation	CR + 7 years		Notify	Department Head	
	Program Materials	CR + 7 years		Notify	Department Head	
	<b>Environmental Health Records</b>				Department Head	
	Health Hazard Investigations	CR + 7 years		Waived	Department Head	
	Licensed Establishments Inspection Reports	CR + 3 years		Waived	Department Head	
	On-Site Waste	EVT: EVT = System is abandoned		Waived	Department Head	
	Variance Approvals	Permanent		N/A	Department Head	
	Water Sample Reports	CR + 7 years		Waived	Department Head	
	Well / Septic Permits	EVT: EVT = System is abandoned		Waived	Department Head	
	<b>Environmental Health</b>					

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Animal Bite Files	CR + 10 years	WI Dept. of Agri.: AG 13	Waived	Department Head	
	Animal Bite Log	CR + 1 year		Waived	Department Head	
	Animal Complaint Log	CR + 7 years		Waived	Department Head	
	Block Grant	CR + 7 years		Waived	Department Head	
	Colilert Culture Quality Control	CR + 5 years		Waived	Department Head	
	Commercial Premise Files	Permanent		N/A	Department Head	
	Delinquent Septic Systems	S		Waived	Department Head	
	Environmental Department Audit	S		Waived	Department Head	
	Environmental Health Mileage Code Dailies	CR + 7 years		Waived	Department Head	
	Establishments Out of Business, Dept. of Agriculture	Permanent		N/A	Department Head	
	Fluoride Nitrate Test Results	CR + 5 years		Waived	Department Head	
	Food & Liquor License Establishments	CR + 7 years		Waived	Department Head	
	Food Borne Illness / Establishment Complaint Files	EVT + 7 years: EVT = Complaint Filed		Waived	Department Head	
	Food Sample Reimbursement Documentation	CR + 7 years		Waived	Department Head	
	Ground Water Monitoring Reports	CR + 20 years		Waived	Department Head	
	Hazardous Waste Department Investigations	CR + 3 years	W.A.C. NR 630.31 (1)(f)	Waived	Department Head	
	Holding Tank Files	CR + 3 years		Waived	Department Head	
	Holding Tank Maintenance Cards	CR + 2 years		Waived	Department Head	
	Hotel / Motel Inspections	CR + 3 years	HSS 192.01 & 192.08	Waived	Department Head	
	Hotel / Restaurant Licensed Establishments Log	Permanent		N/A	Department Head	
	Inspection's for Peddler's Permits	CR + 3 years	HSS 192.01 & 192.08 (I)	Waived	Department Head	
	Lab Water Testing Log	S		Waived	Department Head	
	Lead Inspections (Poisonous & Non-Poisonous)	Permanent		N/A	Department Head	
	Nitrate Analysis Reports (ISE)	Permanent		N/A	Department Head	
	Postage Tally	CR + 1 year		Waived	Department Head	
	Premise Files	Permanent		N/A	Department Head	
	Private Sewage System Inspection Reports	Permanent		N/A	Department Head	
	Property Site Inspections	CR + 10 years		Waived	Department Head	
	Public Camp Grounds	CR + 3 years	HSS 192.01 & 192.08 (I)	Waived	Department Head	
	Radon Grants	CR + 7 years	17	Waived	Department Head	



<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Radon Lab Results	CR + 7 years		Waived	Department Head	
	Rainfall Data	S		Waived	Department Head	
	Recreational Educational Camps	CR + 3 years	HSS 192.01 & 192.08 (I)	Waived	Department Head	
	Reimbursement Reports	CR + 1 year		Waived	Department Head	
	Restaurant & Retail Consumer Complaints	CR + 10 years		Waived	Department Head	
	Restaurant Licensing & Inspection Files	CR + 10 years		Waived	Department Head	
	Restaurants, Out of Business	Permanent		N/A	Department Head	
	Retail Food Establishment Inspection Log	Permanent		N/A	Department Head	
	Retail Food Establishment Inspections	CR + 10 years		Waived	Department Head	
	School Inspection Files	CR + 10 years		Waived	Department Head	
	Septic Permits	Permanent		N/A	Department Head	
	Septic System Inspection Files	Permanent		N/A	Department Head	
	Sewage Complaints	Permanent		N/A	Department Head	
	Soil Test Reports	EVT: EVT = Land developed and		Waived	Department Head	
	Storage Tank Compliance & Maintenance Manual	S		Waived	Department Head	
	Storage Tank Installation & Removal	Permanent		N/A	Department Head	
	Storage Tank Registration & Permit Records	CR + 7 years		Waived	Department Head	
	Storage Tank Remediation Financial Records	CR + 7 years		Waived	Department Head	
	Storage Tank Remediation	Permanent		N/A	Department Head	
	Storage Tank Remediation & Site Assessment Negatives	Permanent		Waived	Department Head	
	Swimming Pool Inspections	CR + 3 years	HSS 192.01 & 192.08	Waived	Department Head	
	Swimming Pool Licensing Log	CR + 2 years		Waived	Department Head	
	Temperature Log, Refrigerator & Incubator	CR + 5 years		Waived	Department Head	
	Transportation Site Inspections	CR + 10 years		Waived	Department Head	
	Vending Machine Inspection Log	CR + 1 year		Waived	Department Head	
	Vending Machine Licensing	CR + 10 years		Waived	Department Head	
	Water Sampling Summary Reports	EVT + 5 years: EVT = Audit		Waived	Department Head	
	Well Inspection Lab Note Log	CR + 5 years		Waived	Department Head	
	Well Inspection Logs	Permanent		N/A	Department Head	
	Well Surveys	CR + 5 years		Waived	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Wisconsin Fund Grant Program Files	CR + 7 years		Waived	Department Head	
	<b>Adolescent &amp; Family Services / Juvenile</b>					
	Adolescent & Family Services Census Sheets	S		Waived	Department Head	C
	Adolescent & Family Services Client Index Card File	S		Waived	Department Head	C
	Adolescent & Family Services Client Listing	S		Waived	Department Head	C
	Adolescent & Family Services Client Logs	S		Waived	Department Head	C
	Adolescent & Family Services Client Records	EVT + 7 years: EVT = Youngest	HSS 92.12(2) & (4)	Waived	Department Head	C
	Daily Staff Attendance Reports	CR + 1 year		Waived	Department Head	
	Daily Staff Schedule	CR + 2 years		Waived	Department Head	C
	Original Offense Report	CR + 2 years		Waived	Department Head	C
	Permission Slips (Residents)	CR + 2 years		Waived	Department Head	C
	Requests for Leave, employee	CR + 1 year		Waived	Department Head	
	Resident Juvenile Case Files, secure	EVT + 10 years: EVT = Case	s. 48.396 & HSS	Waived	Department Head	C
	Resident Juvenile Case Files, shelter care	EVT + 7 years: EVT = Case	s. 48.396 & HSS	Waived	Department Head	C
	Resident Medical Treatment Records	CR + 7 years	HSS 92.12(1) & (2)(3)(4)	Waived	Department Head	C, PII
	Resident Medication Log	S		Waived	Department Head	C, PII
	Shelter Care Secure Admission Register	Permanent	HSS 54.06 (2)(a)(1)	N/A	Department Head	C
	Supervisor Shift Log	CR + 2 years		Waived	Department Head	
	Unit Log (Male & Female)	CR + 2 years		Waived	Department Head	C
	<b>Intake Shared Services</b>				Department Head	
	Certified Child Care Files	EVT + 7 years: EVT = Minor reaches 18 years of age		Waived	Department Head	C
	Child Abuse and Neglect / Child Welfare Client Records	CR + 7 years		Waived	Department Head	C
	Intake & Shared Services Client Records	EVT + 7 years: EVT = Youngest	DHS Memo (82-1A)	Waived	Department Head	C
	Intake Access Contact Listing	CR + 2 years		Waived	Department Head	C
	Kinship Care Client Records	EVT + 7 years: EVT = Minor reaches 18 years of age		Waived	Department Head	C
	<b>Long Term Care</b>					
	Long Term Care Client Listing	EVT + 1 Month: EVT = Transfer		Waived	Department Head	C
	Long Term Care Client Log	S		Waived	Department Head	C

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Long Term Care Client Records - Developmentally Disabled	EVT + 7 years: EVT = Case Closed		Waived	Department Head	C
	Long Term Care Client Records (Except Developmentally Disabled)	EVT + 7 years: EVT = Case Closed		Waived	Department Head	C
	<b>Mental Health AODA / Clinical Services</b>					C
	Client Index Card Files	Permanent		N/A	Department Head	C
	Clinical Services Division Client Records	EVT + 7 years: EVT = Child turns 19 or case closed	HSS 92.12(1)(2)(3)(4), HSS 63.15	Waived	Department Head	C
	Community Support Program (CSP) Admissions,	CR + 7 years	HHS 63.08	Waived	Department Head	C
	Community Support Program (CSP) and Day Treatment (DT) Client Review Notes for State Audit	CR + 7 years		Waived	Department Head	C
	Community Support Program (CSP) Client Review Log	Permanent		N/A	Department Head	C
	Community Support Program (CSP) Client Waiting Lists	S		N/A	Department Head	C
	Community Support Program (CSP) Statistics	CR + 3 years		Waived	Department Head	
	Complaint Investigations	EVT + 7 years: EVT = After		Waived	Department Head	C
	Court Commitment Tracking Sheets	S		Waived	Department Head	C
	Day Treatment and Group Home Waiting Lists	S		Waived	Department Head	C
	Day Treatment Attendance Sheets	CR + 1 Month		Waived	Department Head	C
	Day Treatment Statistics	CR + 2 years	HSS 105.324	Waived	Department Head	
	Disease Indexing	Permanent		N/A	Department Head	
	Employee Blood Born Pathogen Records	EVT + 30 years: EVT =		Waived	Department Head	C, PII
	Employee Training Log	CR + 6		Waived	Department Head	
	Employee Training Records (OSHA)	CR + 3 years	CPL 2-244D	Waived	Department Head	
	Hospital Census Sheets / Demographic	CR + 10 years		Waived	Department Head	
	In-Patient Database Cards	Permanent	HSS 63.16	N/A	Department Head	C, PII
	Medical Staff Credential Files With Disciplinary Action	Permanent		N/A	Department Head	
	Medical Staff Credential Files Without Disciplinary Action	EVT + 7 years: EVT = Termination		Waived	Department Head	
	Nursing Schedules	CR + 5 years		Waived	Department Head	
	OBRA Screening (Omnibus Budget Reconciliation Act)	CR + 1 year		Waived	Department Head	
	Patient Treatment Survey	EVT + 1 year: EVT = Survey		Waived	Department Head	
	Payee Client Files	CR + 2 years		Waived	Department Head	C

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Payee Financial and Billing Records	CR + 2 years		Waived	Department Head	C
	Petty Cash Vouchers	S		Waived	Department Head	
	Physician's Registry	Permanent		N/A	Department Head	
	Quality Assurance	EVT + 1 year: EVT = Survey		Waived	Department Head	
	Supervision Log	CR + 3 years		Waived	Department Head	
	Survey's - Title XIX	CR + 15 years		N/A	Department Head	

	<b>Highway</b>					
	Drug & Alcohol Testing Records	CR + 2 years		Waived	Department Head	C, PII
	Fuel Usage Records	CR + 2 years		Waived	Department Head	
	Heavy Equipment & Vehicle Inventory Ledger	S		Waived	Department Head	
	Machinery, time sheets	EVT + 1 year: EVT = Machinery		Waived	Department Head	
	Permits	Permanent		N/A	Department Head	
	State Gas Reports	CR + 3 years		Waived	Department Head	
	Stock Control Records	CR + 2 years		Waived	Department Head	
	Vehicle Maintenance Histories	Life of Vehicle		Waived	Department Head	
	Vehicle Usage Reports	CR + 2 years		Waived	Department Head	

	<b>Human Services</b>					
	<b>Administrative</b>					
	Agency Evaluations	CR + 7 years	s. 19.21	Waived	Department Head	
	Agency Goals, objectives, short & long term strategic plans	CR + 7 years	s. 19.21	Waived	Department Head	
	Incident / Injury Reports	CR + 7 years / EVT + 1 year:		Waived	Department Head	
	Inventories, facility & equipment	CR + 7 years	s. 19.21	Waived	Department Head	
	Mission Statement, Philosophy, Purpose	CR + 7 years	s. 19.21	Waived	Department Head	
	Program Policies & Procedures	CR + 7 years	s. 19.21	Waived	Department Head	
	<b>Fiscal</b>					
	Fiscal Records, Billing	EVT + 90 days: EVT = Approval & publication	s. 19.21	Waived	Department Head	
	Grants	EVT + 7 years: EVT = Disposal of property	s. 19.21	Waived	Department Head	
	Inventory, non-expendable personal property	CR + 7 years	s. 19.21	Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Ch. 49 case records & other materials of all public assistance kept as required	If no payments have been made for at least 3 years & a face sheet & financial record or payments for each aid account are preserved in accordance with rules adopted by DHSS, set out below	§59.42(4)(a) 18.Wis. Stats.	Notify	Department Head	C
	a. Open Public Assistance Case Records: (1) All data forms: case determination sheets worksheets; medical assistance certification sheets; sheets which document the verification of changeable items, such as income or health status; correspondence to & from applicants & recipients; & any other document needed to support income maintenance agency decisions (2) Sheets which document the verification of unchangeable items, such as social security numbers, birth dates, & citizenship (3) financial record for all payments not on file in CRN	(1) EVT: EVT = Most recent 6 year period (2) As long as case is open (3) As long as case is open	Ch. DCF 121 Wis. Adm. Code	Waived	Department Head	C
	b. Closed Public Assistance Cases & Denied Cases: (1) records specified in 1.a(1) above (2) Most recent data form, records specified in 1.a(2) above & materials relating to any lack of cooperation on the part of the recipient (3) Most recent data form & record specified in 1.a(3) above	(1) EVT + 3: EVT = Closed (2) EVT + 6: EVT = Closed (3) EVT + 3: EVT = Date of Denial	Ch. DCF 121 Wis. Adm. Code	Notify Notify Waived	Department Head	C
	<b>Fraud Referral Records</b>					
	a. Unfounded	EVT + 3 years: EVT = Determination Decision**	Ch. DCF 121 Wis. Adm. Code	Waived	Department Head	C
	b. Founded - referred to D.A.	EVT + 7 years: EVT = Determination Decision**	Ch. DCF 121 Wis. Adm. Code	Waived	Department Head	C
	c. Founded - other	EVT + 5 years: EVT = Determination Decision**	Ch. DCF 121 Wis. Adm. Code	Waived	Department Head	C
	<b>Third-party recovery records</b>	EVT + 1 year: EVT = Case Closed**		Waived	Department Head	C
		** Recommend microfilming essential information				
	<b>JOBS participant records</b>	EVT + 7 years: EVT = Last date of IOBS eligibility, therefore	DHSS Admin. Memo 94-18	Waived	Department Head	
	<b>Social Service Case File</b>					
	a. State Required Case Documentation; initial contact sheet; notice of agency action; social services narrative;	EVT + 3 years: EVT = Case Closed	DHSS Memo 82-1A	Waived	Department Head	C
	b. State Required & County Developed Case Documentation; assessment; or diagnostic forms;	EVT + 3 years: EVT = Case Closed	DCS Memo 92-12	Waived	Department Head	C

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	c. Social Service Records for Cases Opened for Services; applications; referral actions not resulting in case opening; miscellaneous requests & correspondence about individual clients from consumer & other agencies which do not result in case opening	EVT + 1 year: EVT = Final action / Determination	DCS Memo 92-12	Waived	Department Head	C
	<b>Protective Payee</b>	EVT + 7 years		Waived	Department Head	C
	<b>Case Management Files</b>	EVT + 7 years		Waived	Department Head	C
	<b>Payee Miscellaneous Documents</b>	EVT + 3 months: EVT = Audited		Waived	Department Head	C
	<b>Child-Placing Agency</b>					
	a. Register, identifying information about children accepted for service or placement	Permanent	HSS 54.05(2)(a)1	N/A	Department Head	C
	b. Individual Case Records for each child served & his / her family	EVT + 7 years: EVT = Case closed		Waived	Department Head	C
	c. Individual Foster Home Records for each foster home used by the agency, which includes signed applications & agreements	CR + 7 years		Waived	Department Head	
	d. Individual Records of Studied Adoptive Applicants	CR + 7 years		Waived	Department Head	C
	e. Licensing & Certification Records for In-Home & Family Day Care; adult family homes; foster homes; & group foster homes for children; application or other request forms; inspection & observation check lists; correspondence; other documentation relating to licensing or certification; approved license or certificate	EVT + 2 years: EVT = License or certificate is no longer active	DCS Memo 92-12	Waived	Department Head	C
	f. Licensing & Certification Records for above types of facilities where license or certificate was not approved	EVT + 1 year: EVT = Final action / Determination	DCS Memo 92-12	Waived	Department Head	
	g. Adoption records; county agencies providing child welfare services under s. 48.56 or child-placing agencies licensed under s. 48.60, should follow the detailed procedures for adoption information search & disclosure detailed in HSS 53.	Permanent	HSS 53.07(1)	N/A	Department Head	C
	<b>Third-Party Recovery</b>	CR + 7 years		Waived	Department Head	
	<b>Medical Examiner</b>					
	Case Face Sheet Logs	Permanent		N/A	Department Head	C
	Case File Slides	CR + 75 years		Waived	Department Head	C
	Case File X-Rays	CR + 75 years		Waived	Department Head	C
	Case Files	CR + 75 years		Waived	Department Head	C

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Cremation Case Files	Permanent		N/A	Department Head	C
	Data Base Entry Form (Draft)	CR + 5 years		Waived	Department Head	
	Digital Case Photos	CR + 75 years		Waived	Department Head	
	Eyewash Inspection / Waste Container Logs	CR + 5 years		Waived	Department Head	
	Homicide or Suspicious Death Investigation Case Files	CR + 75 years		Notify	Department Head	
	Medication Disposal Logs	CR + 10 years		Waived	Department Head	
	Other investigation case files	EVT + 7 years: EVT = Litigation resolved or case closed		Waived	Department Head	C
	Outside Case Billing Log	CR + 10 years		Waived	Department Head	
	Report for Final Disposition (other reportable)	CR + 3 years		Waived	Department Head	C
	Sharp Container Log	CR + 5 years		Waived	Department Head	

	<b>Planning &amp; Zoning, Parks, Land Information, and Land and Water</b>					
	<b>Administration</b>					
	Annual Work Plans	CR + 5 years		Waived	Department Head	
	Citation & Park Patrol Records	CR + 2 years		Waived	Department Head	
	Construction Contracts	CR + 7 years		Waived	Department Head	
	County Forest Plan	CR + 15 years	§28.11 Wis. Stats	Notify	Department Head	
	Credit Card Receipts	CR + 1 year		Waived	Department Head	
	DNR Agreements	CR + 7 years		Waived	Department Head	
	Employee Emergency Informational Form	S		Waived	Department Head	
	Equipment & Vehicle Registration Reports	EVT: EVT = Equipment / Vehicle disposed of		Waived	Department Head	
	Expenditures, seasonal employees	CR + 3 years		Waived	Department Head	
	General Information	S		Waived	Department Head	
	Guidebooks & Trail Information	S		Waived	Department Head	
	Lawsuits	EVT + 1 year: EVT = Final Disposition		Waived	Department Head	
	Licensed Establishment Collection Reports	CR + 5 years		Waived	Department Head	
	Plat Books	Permanent		N/A	Department Head	
	Radon Reimbursement Requests	CR + 7 years		Waived	Department Head	
	Records of Bounty Claims Forwarded to DNR	CR + 1 year	§59.52(4)(a)3. Wis.	Waived	Department Head	
	Status Reports, monthly	CR + 3 years		Waived	Department Head	
	Street Atlas	Permanent		N/A	Department Head	
	Study, departmental fee rates	CR + 3 years		Waived	Department Head	
	Timber Sale Contracts (bid openings, etc.)	CR + 7 years		Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Wisconsin Conservation Corps Projects / Crew Information	CR + 3 years		Waived	Department Head	
	<b>Land Resources - Land Conservation</b>					
	Agriculture Compliance Inventory & Data Base	Permanent		N/A	Department Head	
	Agriculture Land Preservation Plan	S		Notify	Department Head	
	Cost Sharing Agreement Records	EVT + 3 years: EVT = Termination or Expiration of all contracts signed that year	NR 120 ATCP 50	Waived	Department Head	
	County Mining and Yard Waste Contracts	Permanent		N/A	Department Head	
	Detailed Design Drawings (Land & Water Conservation Designs)	Permanent		N/A	Department Head	
	Drainage District Files	Permanent		N/A	Department Head	
	Erosion and Storm Water Permits	Permanent		N/A	Department Head	
	Farm Conservation Plans	Permanent	120-GM, 408-98, SCS/CRS(29)(31)(a)	N/A	Department Head	
	Interdepartmental Agreements	S		Waived	Department Head	
	Land and Water Resource Management Plan (LWRM)	Permanent		Notify	Department Head	
	Land Conservation Grants	CR + 7 years		Waived	Department Head	
	Non-Metallic Mining Permit Files	Permanent		N/A	Department Head	
	Wetland Maps	Permanent		N/A	Department Head	
	<b>Land Information System</b>					
	Aerial Photographs	Permanent		N/A	Department Head	
	Assessors Plats	Permanent		N/A	Department Head	
	Award of Damage for Scenic Rights	EVT: EVT = Recorded		Waived	Department Head	
	Cadastral Maps	Permanent		N/A	Department Head	
	Certified Mileage Lists	S		Waived	Department Head	
	County Development Plan	S		Notify	Department Head	
	Grant Application	CR + 10 years		Waived	Department Head	
	Grant Contract Work Project Documentation	CR + 10 years		Waived	Department Head	
	Hauler Licenses / Applications	EVT + 2 years: EVT = Renewal		Waived	Department Head	
	Land Information Plan	Permanent		Notify	Department Head	
	Parcel Maps for Tax Records	CR + 10 years		Waived	Department Head	
	Relocation of Orders / Maps	S		Waived	Department Head	
	Report of Functional Jurisdiction of Roads	EVT + 10 years: EVT = Next Report Received		Waived	Department Head	
	Town Plats	CR + 3 years		Waived	Department Head	
	Waste Management Plan	S		Waived	Department Head	
	Water Quality Approval Letters	Permanent		N/A	Department Head	
	<b>Park System</b>					



<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Automobile Accident Reports	CR + 7 years		Waived	Department Head	
	Culverts, Dams and Bridges	Until no longer operated and maintained	Ch.'s 30 & 31 Wis. Stats.	Waived	Department Head	Includes permits, orders, maintenance, and inspection
	Facility Reservations	EVT + 7 years: EVT = Last Reservation		Waived	Department Head	
	Grant, Funding	Life of Project		Waived	Department Head	
	History of - Photo albums, etc.	Permanent		Notify	Department Head	
	Incident Reports	CR + 7 years		Waived	Department Head	
	Injury Report Packets, employee	EVT + 7 years: EVT = Employee Terminated		Waived	Department Head	
	Injury Reports, non-Employee	CR + 7 years		Waived	Department Head	
	Land Acquisition, deeds, abstracts	Permanent		N/A	Department Head	
	Lifeguard Activity Log	CR + 2 years		Waived	Department Head	
	Log, Chemical Applications	CR + 7 years		Waived	Department Head	
	Log, Water Use	Life of Project		Waived	Department Head	
	Log, Well Data	Life of Project		Waived	Department Head	
	Master Park Plan (5 Year Plan)	S		Notify	Department Head	
	Park System Task Report	CR + 3 years		Waived	Department Head	
	Plans / Construction Documents / Specifications / Drawings	Life of Project		Waived	Department Head	
	Program Registrations	EVT + 7 years: EVT = Last Reservation		Waived	Department Head	
	Publicity Newsletter	Permanent		N/A	Department Head	
	Safety Inspection Report	CR + 7 years		Waived	Department Head	
	Site Plans	Life of Project		Waived	Department Head	
	Volunteer Information	CR + 3 years		Waived	Department Head	
	<b>Planning and Zoning</b>					
	Amendments to the County Development Schedule	Permanent		N/A	Department Head	
	Atlas	S		Notify	Department Head	
	Board of Adjustment Case Files	Permanent		N/A	Department Head	
	Board of Adjustment Decisions & Supporting Documentation	Permanent		N/A	Department Head	
	Building Plans	Life of Project		Waived	Department Head	
	Conditional Use Files	Permanent		N/A	Department Head	
	Drainage District Records	Permanent		N/A	Department Head	
	Flood Hazard Inquiries, Determinations	Permanent		N/A	Department Head	
	Inspection Reports for Sanitary	Permanent		N/A	Department Head	
	Land Use Permits, easements	Permanent		N/A	Department Head	
	Log, board of adjustment cases	Permanent		N/A	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Log, violations	Permanent		N/A	Department Head	
	Permit Applications	Permanent		N/A	Department Head	
	Permit Records	Permanent		N/A	Department Head	
	Plan of Operations and Site Plans	Permanent		N/A	Department Head	
	Project, Redistricting, Reapportionment	EVT + 10 years: EVT = Next Report Received or Project Completed		Waived	Department Head	
	Receipt Books	CR + 7 years		Waived	Department Head	
	Rezoning Files, zoning amendments	Permanent		N/A	Department Head	
	Subdivision Records	Permanent		N/A	Department Head	
	Town Plan Commission Reviews, community assistance	Permanent		N/A	Department Head	
	Video Tapes	CR + 3 years		Waived	Department Head	
	Violation Complaint	Permanent		N/A	Department Head	
	Violation Files	Permanent		N/A	Department Head	
	Wetland & Flood Plain Preservation Maps	Permanent		N/A	Department Head	
	Zoning Applications, rejected and no activity	Permanent		N/A	Department Head	
	Zoning Committee Records	Permanent		N/A	Department Head	
	Zoning Map	Permanent		N/A	Department Head	
	Zoning Ordinances	Permanent		N/A	Department Head	
	Zoning Permits Issued	Permanent		N/A	Department Head	
	<b>Recycling and Solid Waste</b>					
	Computer Recycling Reports	Permanent		N/A	Department Head	
	County Compost Facility Reports	Permanent		N/A	Department Head	
	County Landfill Agreements	S		Waived	Department Head	
	Feasibility Studies	Permanent		N/A	Department Head	
	Hazardous Waste Collection Grant Program Files	CR + 5 years		Waived	Department Head	
	Hazardous Waste Surveys	CR + 3 years	§ NR 544.07 Wis.	Waived	Department Head	
	Household Hazardous Waste (Clean Sweep)	Permanent	§ NR 187 Wis. Adm. Code	N/A	Department Head	
	Materials Recycling Facility Monthly Reports	EVT + 3 years: EVT = Superseded		Waived	Department Head	
	Recycling Grants	EVT + 7 years: EVT = Audited		Waived	Department Head	
	Recycling Newsletter	CR + 10 years		Waived	Department Head	
	Service Agreement (MRF)	EVT + 7 years: EVT = Termination		Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Solid Waste Management Plan	Permanent		N/A	Department Head	

	<b>Human Resources</b>					
	Department Training Records	CR + 7 years		Waived	Department Head	
	Directives & Policies	EVT + 7 years: EVT = Superseded or Terminated		Waived	Department Head	
	EEO - 4 Reports	CR + 7 years		Waived	Department Head	
	Obsolete Job Descriptions & any other personnel or employment records made or kept, including but not limited to, application forms or test papers by applicants & other records or decisions pertaining to hiring, promotion, demotion, transfer, layoff or termination, terms of compensation, & selection or training	EVT + 4 years: EVT = Position obsolete, except where a charge of discrimination has been filed; all personnel records relevant to a charge or action shall be retained until final disposition of the charge or action		Waived	Department Head	
	Performance Evaluations & Medical Records	CR + 6 years		Waived	Department Head	
	Union Contracts & Grievance, Mediation & Arbitration Records	Permanent		N/A	Department Head	

	<b>Register of Deeds</b>					
	(See Addendum E incorporated herein by reference as presently constituted or hereafter revised)					

	<b>Sheriff</b>					
	<b>Process / Identification Bureau</b>					
	Attorney Letters	CR + 7 years		Waived	Department Head	
	Bureau of Identification Sheets	Permanent		N/A	Department Head	
	Civil Process Worksheet	CR + 1 year		Waived	Department Head	
	Correspondence Instructing Civil Process, service	CR + 7 years		Waived	Department Head	
	Daily Roster Assignments	CR + 1 year		Waived	Department Head	
	Death Investigation Negatives, Sensitive in Nature	Permanent		N/A	Department Head	
	Department Employee Photos	EVT + 7 years: EVT = Termination		Waived	Department Head	
	Evidence, Major Cases	EVT + 1 year: EVT = Final Appeal		Waived	Department Head	Documentation, not actual physical evidence
	Execution Log	CR + 7 years		Waived	Department Head	
	Executions	CR + 7 years		Waived	Department Head	
	Finger Print Cards	Permanent		N/A	Department Head	
	Foreclosure's, Sheriff's Sales	EVT + 7 years: EVT = Sale of Property		Waived	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Form 50's	CR + 7 years		Waived	Department Head	
	Injunctions	EVT: EVT = After Expiration		Waived	Department Head	
	Mug Shots	Permanent		N/A	Department Head	
	Process, deposit receipts	CR + 7 years		Waived	Department Head	
	Process, receipt print-outs	CR + 7 years		Waived	Department Head	
	Proof of Service	CR + 7 years		Waived	Department Head	
	Property Inventory Audit	EVT + 20 years: EVT = Disposition of property		Waived	Department Head	
	Restraining Orders	EVT: EVT = Closed		Waived	Department Head	
	Traffic Accident Photos	EVT + 6 years: EVT = Date of final Appeal		Waived	Department Head	
	Transport Records	CR + 7 years		Waived	Department Head	
	<b>Jail Division</b>					
	Account work sheets	CR + 7 years		Waived	Department Head	
	Applicant Status Sheets (non-hire)	EVT + 1 year: EVT = Interview		Waived	Department Head	
	Block Check Sheets	CR + 8 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	Bond Receipts	CR + 8 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	Booking Sheets	Permanent		N/A	Department Head	
	Canteen sheets	CR + 7 years		Waived	Department Head	
	Cash Books	CR + 8 years		Waived	Department Head	
	Check Books	CR + 7 years		Waived	Department Head	
	Contract Employee Files	EVT + 5 years: EVT = Termination		Waived	Department Head	
	Critical Incidents	EVT + 8 years: EVT = Incident		Waived	Department Head	
	Daily Attendance Rosters	CR + 8 years		Waived	Department Head	
	Daily Bond	CR + 8 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	Daily Work Shift Roster	CR + 8 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	Dockets, daily jail records	CR + 8 years	§ 59.27(8) Wis. Stats.	Notify	Department Head	
	Exercise Logs	CR + 8 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	Fire Equipment & Inspection Report	CR + 8 years		Waived	Department Head	
	Huber Block Check Sheets	CR + 8 years		Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Huber Daily Inmate Roster	EVT + 8 years: EVT = Release of Inmate	§ DOC 348.09(1) Wis. Adm. Code	Waived	Department Head	
	Huber Inmate Incarceration Files	EVT + 8 years: EVT = Release of Inmate		Waived	Department Head	
	Huber Registration of Visitors	CR + 8 years	§ DOC 348.09(4) Wis. Adm. Code	Waived	Department Head	
	Huber Rules Forms	CR + 8 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	Inmate Daily Activity Log Forms	CR + 8 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	Inmate Files: disciplinary forms, Huber revocation forms, employer information forms, employer job search, verification sheets, court orders	EVT + 8 years: EVT = Release of Inmate	§§ DOC 348.09 & 350.11 Wis. Adm. Code	Waived	Department Head	
	Inmate Medical Records	EVT + 8 years: EVT = Release of Inmate	§§ 146.81 to 146.83 Wis. Stats. and §§ DOC 348.09 & 350.11 Wis. Adm. Code	Waived	Department Head	C, PII
	Jail billing	CR + 8 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	Jail Inmate Register	S	§ DOC 350.11 Wis.	Waived	Department Head	
	Jail Kitchen Menu	CR + 1 Month		Waived	Department Head	
	Jailer logs	CR + 8 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	Law Suits & Complaints	EVT + 5 years: EVT = Settlement or Closure		Waived	Department Head	
	Ledger Sheets	CR + 7 years		Waived	Department Head	
	Monthly Equipment Check	CR + 8 years		Waived	Department Head	
	Shift Logs	CR + 8 years		Waived	Department Head	
	Surveillance Recordings-Audio/Video	121 days	§893.80 Wis. Stats.	Waived	Department Head	
	Visitor Log	EVT + 8 years: EVT = Date of Visit	§ DOC 350.11 Wis. Adm. Code	Waived	Department Head	
	Volunteer Security	CR + 5 years		Waived	Department Head	
	<b>Detective Division</b>					
	Arrest Records	CR + 8 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	Citizen Complaints	Permanent		N/A	Department Head	
	Evidence Cards	CR + 10 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Field Interrogation Cards	EVT + 8 years: EVT = Close of Case		Waived	Department Head	
	Incident Records	CR + 10 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	Internal Investigation Files	EVT + 1 year: EVT = Death of person unless there is open activity on the case		Waived	Department Head	
	Juvenile Cards	EVT + 1 year: EVT = Juvenile's 18th Birthday		Waived	Department Head	
	Ordinance Violation Citation	CR + 2 years		Waived	Department Head	
	Polygraph Examinations and Reports	Permanent		N/A	Department Head	
	<b>Patrol Division</b>				Department Head	
	False Alarm Card File	S		Waived	Department Head	
	False Alarm Door Opening Invoices	CR + 1 year		Waived	Department Head	
	Fleet Maintenance Records	Life of Vehicle		Waived	Department Head	
	Intern Records	CR + 5 years		Waived	Department Head	
	School Surveys	CR + 5 years		Waived	Department Head	
	Squad Car Video Recordings	CR + 121 Days	§893.80 Wis. Stats.	Waived	Department Head	
	Uniform Traffic Citations	EVT + 1 year: EVT = Closed, disposed, or canceled		Waived	Department Head	
	Wisconsin Accident Reports	CR + 8 years		Waived	Department Head	
	Work Schedules	CR + 7 years	§ 59.27(8) Wis. Stats.	Waived	Department Head	
	<b>Dispatch Center</b>					
	Audio Tapes (e.g., 911)	CR + 121 days	§893.80 Wis. Stats.	Waived	Department Head	If digital, must produce original
	Incident Record	CR + 10 years		Waived	Department Head	
	Telecommunicator's Radio	CR + 121 days		Waived	Department Head	
	<b>Records</b>					
	Accident Report	CR + 8 years		Waived	Department Head	
	Accident Reports, Non-Reportable	CR + 8 years		Waived	Department Head	
	Alcohol Assessments Education Referrals	CR + 5 years		Waived	Department Head	
	Blueprints, Justice Department	Permanent		N/A	Department Head	
	Citations	CR + 8 years		Waived	Department Head	
	Contract Municipality Logs	S		Waived	Department Head	
	Driver Condition Behavior Reports	CR + 2 years		Waived	Department Head	
	Ignition Interlock Device Installation & Removal Record	S		Waived	Department Head	
	Incident Reports	Permanent		N/A	Department Head	
	Laser Logs	EVT + 8 years: EVT = End of use		Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Money Transfer Log, Front Desk	CR + 2 years		Waived	Department Head	
	Orders to Produce (Writs)	S		Waived	Department Head	
	Patrol Roster	CR + 2 years		Waived	Department Head	
	Radar Certification Logs	EVT + 8 years: EVT = End of use		Waived	Department Head	
	State Uniform Crime Report	CR + 5 years		Waived	Department Head	
	Warning Notices	EVT + 6 Months: EVT = After compliance		Waived	Department Head	
	<b>Drug Unit</b>					
	Asset Forfeiture Log	Permanent		N/A	Department Head	
	Asset Forfeitures	EVT + 8 years: EVT = Given up for Auction		Waived	Department Head	
	Confidential Informant File	Permanent		N/A	Department Head	
	Confidential Informant Log	Permanent		N/A	Department Head	
	Evidence Destruction File	EVT + 8 years: EVT = Last date of Appeal		Waived	Department Head	
	Fleet Leased Contracts	EVT + 1 year: EVT = Contract termination		Waived	Department Head	
	Incident Report Log	EVT + 8 years: EVT = Date of Last Incident		Waived	Department Head	
	Incident Reports	Permanent		N/A	Department Head	
	Intelligence Request Log	CR + 15 years		Waived	Department Head	
	Known Offender File (KOF) Lawsuits	EVT + 7 years: EVT = Date of last appeal		Waived	Department Head	
	Officer's Daily Reports	CR + 7 years		Waived	Department Head	
	Petty Cash Vouchers	EVT + 7 years: EVT = Audited		Waived	Department Head	
	Search Warrants	EVT + 1 year: EVT = Search Completed		Waived	Department Head	
	Warrant, Sex offence & Drug Activity Log Book	Permanent		N/A	Department Head	
	<b>Court Services / Warrants</b>					
	Bailiff Time and Activity Report	CR +3 years		Waived	Deptment Head	
	Court Security Reports	CR +3 years		Waived	Deptment Head	
	Daily Employee Witness Court Record	S		Waived	Deptment Head	
	Stun Belt in Custody Notification & Maintenance Log	EVT + 8 years: EVT = Date of Final Appeal		Waived	Deptment Head	
	Warrant Cards	EVT + 1 year: EVT = Warrant Cancellation		Waived	Deptment Head	
	Warrant, cancellation sheet from court	EVT + 7 years: EVT = Warrant Cancellation		Waived	Deptment Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Warrant, ledgers	EVT + 7 years: EVT = Warrant Cancellation		Waived	Deptment Head	
	Warrant, problems and complaints	CR + 7 years		Waived	Deptment Head	
	Warrants	EVT: EVT = Until Satisfied		Waived	Deptment Head	
	Warrants, cancelled - gold sheet	EVT + 1 Month: EVT = Cancellation or Served		Waived	Deptment Head	
	Warrants, cancelled extradition	EVT + 3 years: EVT = Warrant Cancellation		Waived	Deptment Head	
	<b>Administration</b>					
	Accidents, squad	EVT + 8 years: EVT = Closed		Waived	Department Head	
	Contract Logs	CR + 1 year		Waived	Department Head	
	Conveyance Cards	EVT + 3 years		Waived	Department Head	
	Daily Roll Call Rosters	CR + 8 years		Waived	Department Head	
	Department General Orders	Permanent		N/A	Department Head	
	Emergency Personnel Employee Records	S		Waived	Department Head	
	False Alarm Fee Documentation, uncollectible	CR + 3 years		Waived	Department Head	
	Grant Reports and Documentation	EVT + 3 years: EVT = Last Payment Received		Waived	Department Head	
	Overtime Cards	CR + 7 years		Waived	Department Head	
	Psychological Evaluations (Employee)	EVT + 15 years: EVT = Termination		Waived	Department Head	
	Warrants, teletypes / municipalities	EVT: EVT = Warrant Cancellation		Waived	Department Head	

	<b>Surveyor</b>					
	Annexation / Detachment Plats	S	§§ 66.0217, .0219, .0221, .0223 Wis. Stats.	N/A	Department Head	
	Assessor's Plat	S	§ 70.27 Wis. Stats.	N/A	Department Head	
	Bulkhead Line Maps	S	§30.11(3) Wis. Stats.	N/A	Department Head	
	Cemetery Plat Court Orders	S	§ 157.07 Wis. Stats.	N/A	Department Head	
	Cemetery Plats	S	§ 157.07 Wis. Stats.	N/A	Department Head	
	Certified Survey Maps	S	Ch. 236 Wis. Stats.	N/A	Department Head	
	Condominium Instruments	S	Ch. 703. Wis. Stats.	N/A	Department Head	
	Correction Instruments	S	§ 236.295 Wis. Stats.	N/A	Department Head	
	County Highway Widening Plan	S	Ch. 83 Wis. Stats.	N/A	Department Head	
	Official Map Certification	S	§ 62.23(6)(b) Wis. Stats.	N/A	Department Head	



<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	PLSS Monument Records	S	Ch. A-E 7 Wis. Adm. Code	N/A	Department Head	
	Property Survey Maps	S	Ch. A-E 7 Wis. Adm. Code	N/A	Department Head	
	Section Corner Monument Location Documentation	Permanent	§§ 59.45, 59.74, & 59.75 Wis. Stats.	N/A	Department Head	
	Subdivision Plat Court Orders	S	Ch. 236 Wis. Stats.	N/A	Department Head	
	Subdivision Plats	S	Ch. 236 Wis. Stats.	N/A	Department Head	
	Subdivision Replats	S	Ch. 236 Wis. Stats.	N/A	Department Head	
	Town Monument Certification	S	§§ 59.45 & 60.84 Wis. Stats.	N/A	Department Head	
	U.S. Geological Survey Maps	S		Waived	Department Head	

	<b>University Extension</b>					
	4-H, Award/Convention Materials	CR + 50 years		Waived	Department Head	
	4-H, Enrollments	CR + 25 years		Waived	Department Head	
	4-H, Health Records - Summer Camp	EVT + 3 years: Child turns 21 years of age		Waived	Department Head	
	Farmland Preservation Certifications	CR + 7 years		Waived	Department Head	
	Garden Plot Rentals	CR + 3 years		Waived	Department Head	
	Homemaker Program, Agencies / Groups	CR + 7 years		Notify	Department Head	
	Homemaker Program, Participants	CR + 7 years		Waived	Department Head	
	Monthly Reports, UPS, Copies, Postage	CR + 1 year		Waived	Department Head	
	News Releases	CR + 2 years		Waived	Department Head	
	Newsletters, Originals	CR + 25 years		Waived	Department Head	
	Premium Books, County Fair	CR + 1 year		Notify	Department Head	
	Program / Teaching Curriculum	S		Notify	Department Head	
	Project Files	S		Waived	Department Head	
	Shipping Books, UPS	CR + 1 year		Waived	Department Head	
	Soil Sample Reports	CR + 2 years		Waived	Department Head	
	Soil Test Receipts, Invoices	CR + 3 years		Waived	Department Head	
	Volunteer Certification, VOLT, Program (Volunteer Orientation Leadership Training)	Permanent		Waived	Department Head	

	<b>Veterans Service</b>					
	Cemetery List	S		Waived	Department Head	
	Commemorative Event Information	CR + 10 years		Waived	Department Head	
	Grave Registration Files	Permanent		Notify	Department Head	
	Mailing Log, Daily In/Out	CR + 1 year		Waived	Department Head	
	Military Separation Records of Veteran's	Permanent		N/A	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Monthly Forms Tally Sheet	CR + 2 years		Waived	Department Head	
	Newsletter	CR + 6 years		Send a copy to Librarian: WI Veterans Museum, 30 W. Mifflin St., Madison, WI 53703	Department Head	
	News Releases	CR + 6 years		Waived	Department Head	
	Office Critiques	CR + 2 years		Waived	Department Head	
	Regulations	S		Waived	Department Head	
	Veteran's Benefit Case Files	EVT + 2 years: EVT = Death		Waived	Department Head	C
	Veterans' Information Management System (VIMS) Backup Disks	S		Waived	Department Head	
	Veterans' Personnel Cards	Permanent		N/A	Department Head	
	Veterans' Personnel Records	Permanent		N/A	Department Head	
	Veterans' Personnel Records, Agent Orange	Permanent		N/A	Department Head	
	Veterans' Personnel Records, Desert Storm	Permanent		N/A	Department Head	
	Veterans' Relief Records	CR + 10 years		Waived	Department Head	
	Wisconsin Department of Veterans' Affairs Bulletins	Permanent		N/A	Department Head	

**COUNTY CLERK  
ADDENDUM B**

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	<b>Administration</b>					
	Aid to immigration societies	CR + 7 years	s. 59.53(17)	Notify	Department Head	
	Apportionment maps	Until next apportionment	s. 59.03	Waived	Department Head	
	Audit reports	CR + 7 years	n/a	Notify	Department Head	
	Bank statements	CR + 7 years	s. 59.61(3)	Waived	Department Head	
	Bounty claims forwarded to DNR	CR + 1 year	s. 59.52(4)	Waived	Department Head	
	Consolidation of counties: order for referendum or special election regarding	CR + 7 years or until audited; whichever is earlier	s. 59.52(4)	Waived	Department Head	
	Consolidation of counties: order for referendum or special election regarding	CR + 7 years	s. 59.08(7)	Waived	Department Head	
	County contribution to the mosquito control district	CR + 7 years	s. 59.701(15)	Waived	Department Head	
	County officers: appointment of	CR + 7 years	s. 59.25(2), 59.23(1), 17.21(6)	Waived	Department Head	
	County orders uncalled for by the payee; list of	CR + 7 years	s. 59.64(4)	Waived	Department Head	
	County zoning ordinance: petition for amendment of	CR + 7 years	s. 59.69(5)	Waived	Department Head	
	Court commissioner: statement of all actions or proceedings	CR + 7 years	s. 59.61(3), 59.61(1)	Waived	Department Head	
	Court costs and fees	CR + 7 years	s. 814.22(2)	Waived	Department Head	
	Crop reports by local assessors	CR + 3 years	s. 59.52(4)	Notify	Department Head	
	Detachment of farm land from cities, entry of judg.	CR + 7 years	s. 62.075(5)	Waived	Department Head	
	Equalization board proceedings or board of review	CR + 7 years	n/a	Notify	Department Head	
	Farmland preservation agreements: application	CR + 7 years	s. 91.13(1)	Waived	Department Head	
	Forest products: notice of cutting forest products	CR + 7 years	s. 26.03(1)(a)	Waived	Department Head	
	Forfeiture: statements regarding the collection of and the payment to county treasurer	CR + 7 years	s. 778.15	Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Legislative documents, copies of	Retain until superseded by published statutes	s. 35.85(11)	Waived	Department Head	
	Metropolitan Transit Authority annual report	CR + 7 years	s. 66.94(40)	Waived	Department Head	
	Oaths of office: county officers	CR + 7 years	s. 59.23(2), 59.52(4)	Waived	Department Head	
	Officers: town, city and village certified to county clerk	After date of expiration of term listed	s. 59.52(4)	Notify	Department Head	
	Official bonds: county officers	CR + 6 years	s. 59.17(14)(b), 59.52(4)	Waived	Department Head	
	Payment vouchers and disbursement made by county treasury	CR + 7 years or until audited, whichever is earlier	s. 59.69(4)	Waived	Department Head	
	Publications fees	CR + 7 years	s. 985.065(2)(d)	Waived	Department Head	
	Removals from office; testimony and proceedings	CR + 7 years	s. 17.16(8)©	Notify	Department Head	
	Resignation of public officers	CR + 7 years	s. 17.01(5), 17.01(7)	Waived	Department Head	
	Resolutions: agricultural use zoning ordinance	CR + 7 years	s. 91.73(3)	Waived	Department Head	
	School tuition claims for nonresidents	CR + 7 years	s. 121.77(2)(a)	Waived	Department Head	
	Town: order establishing a new town	CR + 7 years	s. 59.23(k)	Notify	Department Head	
	Town: record of any alteration of boundaries or organization of town	CR + 7 years	s. 59.23(k)	Notify	Department Head	
	Writs of certiorari	CR + 7 years	s. 752.04	Waived	Department Head	
	<b>County Board</b>					
	County board committee proceedings	CR + 7 years	n/a	Notify	Department Head	
	County board meeting notices	CR + 7 years	s. 59.11	Waived	Department Head	
	County board ordinances	CR + 7 years	n/a	Notify	Department Head	
	County board proceedings: original papers, resolutions and reports concerning	6 years after date of publication	s. 59.717(1)	Notify	Department Head	
	County board resolutions	CR + 7 years	s. 59.02(1)	Notify	Department Head	
	Statistical report of county clerk to county board	CR + 2 years	n/a	Notify	Department Head	
	<b>Elections</b>					
	Absentee certificate-affidavit envelopes	90 days after date of local election and 22 months after Federal election	s. 7.23	Waived	Department Head	
	All other election materials and supplies	90 days after date of local election and 22 months after Federal election	s. 7.23(1)(k)	Waived	Department Head	
	Ballots, Federal	22 months after election	s. 7.23(1)(f)	Waived	Department Head	
	Ballots, non-Federal	30 days after election	s. 7.23(1)(h)	Waived	Department Head	
	Cancelled voter registration cards	4 years after cancellation	s. 7.23(1)©	Waived	Department Head	
	Certificate of election	CR + 7 years	s. 7.60(6)	Waived	Department Head	
	Certified lists of all candidates on file	90 days after date of local election and 22 months after Federal election	s. 7.08(2)(a)	Waived	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Detachable recording units	14 days for primary and 21 days after any other election-clear or erase after transfer to a disk or other recording medium	s. 7.23(1)(g)	Waived	Department Head	
	Disk or tape of election data	90 days after date of local election and 22 months after Federal election	s. 7.23(1)(g)	Waived	Department Head	
	Election notices (types A-E and special elections), proof of publication and correspondence	1 year after date of local election and 22 months after Federal election, unless contested, then by court order	s. 7.23(1)(j)	Waived	Department Head	
	Election returns including inspector's statements, tally sheets, lists and envelopes	90 days after day of local election and 22 months after Federal election	s. 7.23(1), 7.51(5)	Waived	Department Head	
	Election supplies	90 days after date of local election and 22 months after Federal election	s. 7.10(1)(a)	Waived	Department Head	
	Electronic ballot tallies	90 days after date of local election and 22 months after Federal election	s. 7.23(1)(g)	Waived	Department Head	
	Federal elections records other than registration cards	22 months after day of election	s. 7.23(1)(f)	Waived	Department Head	
	Financial registration statements	6 years after date of termination of registrant	s. 7.23(1)(d)	Waived	Department Head	
	Financial campaign reports	6 years after date of receipt	s. 7.23(1)(d)	Waived	Department Head	
	Nomination papers for political party committee man or woman	90 days after date of election	s. 7.23(k)	Waived	Department Head	
	Nomination papers--County offices, 1940 & after	90 days after election	s. 7.23(k)	Waived	Department Head	
	Nomination papers--County offices, before 1940	n/a	n/a	Notify	Department Head	
	Official canvasses including statements and determinations for local elections	10 years after date of election	s. 7.23(a)(i)	Waived	Department Head	
	Official canvasses: votes cast for state and national offices	10 years after date of election	s. 7.23(1)(i)	Waived	Department Head	
	Recount fee record	CR + 7 years	s. 9.01(1)(ag)4	Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Registration and poll lists; non-partisan elections, 1940 and after	2 years after election	2. 7.23(1)(f)	Waived	Department Head	
	Registration and poll lists; non-partisan elections, before 1940	n/a	n/a	Notify	Department Head	
	Registration and poll lists; partisan elections, 1940 and	4 years after election	s. 7.23(1)(f)	Waived	Department Head	
	Registration and poll lists; partisan elections, before 1940	n/a	n/a	Notify	Department Head	
	Registration and voting statistics	90 days after date of local election and 22 months after Federal election	s. 6.275(1)	Notify	Department Head	
	Sample ballots	22 months after federal election and 30 days after non-federal election	s. 5.66(2)	Waived	Department Head	
	<b>Licenses</b>					
	Automobile registration lists	CR + 7 years	s. 341.17(4)(a)I	Waived	Department Head	
	Dog license fee records, reports	3 years provided the records have been audited	s. 174.08	Waived	Department Head	
	Dog licenses and tags; related records	CR + 2 years	s. 174.07	Waived	Department Head	
	Dog licenses: town and municipal treasurers' records of licenses sold and issued	CR + 3 years	s. 59.52(4)	Waived	Department Head	
	Dogs: list of, kept in assessment district	CR + 2 years	s. 174.06(7)	Waived	Department Head	
	Hunting, trapping, fishing licenses & other approvals	CR + 3 years	s. 29.09, 29.09(6)	Waived	Department Head	
	License fee records: hunting, trapping, fishing	3 years provided the records have been audited	s. 29.09(7)(a)	Waived	Department Head	
	Livestock: claims for damage by dogs	CR + 7 years	s. 174.11(1)	Waived	Department Head	
	Marriage license applications and supporting papers	CR + 10 years	s. 59.52(4)	Waived	Department Head	
	Marriage license docket	CR + 7 years	s. 765.20	Waived	Department Head	
	Marriage license receipts and records	CR + 7 years	s. 59.07(90) (Milw. Co. only), s. 765.15	Waived	Department Head	
	Marriage of underage persons, consent of guardian	CR + 7 years	s. 765.02(2)	Waived	Department Head	
	Notice of stray animals	CR + 2 years	s. 170.02	Waived	Department Head	
	Vehicles: applications for registration of	CR + 7 years	s. 341.08(5)	Waived	Department Head	
	<b>Public Lands and Roads</b>					
	Airport land: acquisition of, order and maps	CR + 7 years	s. 114.33 (6)	Notify	Department Head	
	Award of compensation pursuant to relocation orders	CR + 7 years	s. 32.05(7)(a)	Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Condemnation proceedings: assessments of benefits and damages made in	CR + 7 years	s. 27.065(2)(b)	Waived	Department Head	
	Condemnation proceedings: publication of final determination as a class 2 notice	CR + 7 years	s. 27.065(6)(j)	Waived	Department Head	
	County forest lands: easements, entry & withdrawal	CR + 7 years	s. 28.11(4)(f), 28.11(4)(d)	Waived	Department Head	
	County forest road aids; maps	CR + 7 years	s. 86.315(4)(a)	Waived	Department Head	
	County highways; acquisition of land, order and map; construction, statements and payroll	CR + 7 years	s. 83.08(1), 83.04(4)	Waived	Department Head	
	County highways; finding, determination, and declaration regarding controlled access	CR + 7 years	s.83.027(1)	Waived	Department Head	
	County improvement notice	CR + 7 years	s. 27.065(9)(a)	Waived	Department Head	
	County park commissioners; appointment of	CR + 7 years	s. 27.02(1)	Waived	Department Head	
	County Parks and parkways: final determination or damages and benefits, notice of appeal, liens against property, plans and specifications of contractors special assessments	CR + 7 years	s. 27.065, (5)(6)(8)(9)(10)	Waived	Department Head	
	District protection and rehabilitations, special assessments & changes	CR + 7 years	s. 33.32(1)©	Waived	Department Head	
	Drainage district: transfer to other jurisdiction, petition and resolution	CR + 7 years	s. 88.83(4)	Waived	Department Head	
	Flood works: petition for reports; notice of hearing	CR + 7 years	s. 87.04(1), 87.07(1)	Waived	Department Head	
	<b>Records Series</b>					
	Highway & road records, miscellaneous, before 1930	n/a	n/a	Notify	Department Head	
	Highway jurisdiction maps	CR + 7 years	s. 86.302(1)	Waived	Department Head	
	Leasing of land under the U.S. flood control act of 1954	CR + 7 years	s. 24.39(3)	Waived	Department Head	
	Municipal power and water districts: resolutions of organization, public service commission reports, petitions, referendum results	CR + 7 years	s. 198.03, 198.04, 198.06	Waived	Department Head	
	Notices to town assessors regarding lands sold and owned by county: copies	CR + 3 years	s. 59.52(4)	Waived	Department Head	
	Petitions and objections regarding establishment of public land, inland lake protection and rehabilitation district	CR + 7 years	s. 33.26(1), 33.25(1)	Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
	Protest of proposed zoning amendment in airport affected area	CR + 7 years	s. 59.69(5)	Waived	Department Head	
	Relocation orders	Retain latest revision for each project	s. 32.05(1)(a)	Waived	Department Head	
	Resolution redefining metro sewage district boundary	CR + 7 years	s. 66.888(1)(d)	Waived	Department Head	
	State trunk highways, county maps	CR + 7 years	s. 84.02(12)	Notify	Department Head	
	Streets and parkways: adoption of grades and alterations	CR + 7 years	s. 27.065(3)	Waived	Department Head	
	Town highways, petitions for immediate repair to culvert or bridge	CR + 7 years	s. 81.38(3)	Waived	Department Head	
	Town highways: appropriations; appeals to county board	CR + 7 years	s. 81.38(1), 88.83(4)	Waived	Department Head	
	Zoning ordinance: adoption of	CR + 7 years	s. 59.61(5)	Waived	Department Head	
	<b>Social Services</b>					
	Aid: administration of and record of disbursements	CR + 7 years	s. 45.14(2)	Waived	Department Head	
	Aid: application for, hearing and review	CR + 7 years	s. 49.50(8)(b)1, 49.50(9)(a)	Waived	Department Head	
	Annual report: department of social services	CR + 7 years	s. 46.18(10)	Waived	Department Head	
	Audit by State Department of Health and Social Services and administrative review of general relief agency	CR + 7 years	s. 46.206(1)(c), 46.208(2)(m)	Waived	Department Head	
	Audits of claim against county	CR + 7 years	s. 46.18(10)	Waived	Department Head	
	Bonds furnished by conservator of county hospital patient or county home resident or guardian for mentally ill patient	CR + 7 years	s. 880.295(1)	Waived	Department Head	
	Cemetery care funds	CR + 7 years	s. 157.11(9g)(a)2.	Waived	Department Head	
	Clerk of Court for juvenile matters: appointment of	CR + 7 years	s. 48.04(1)	Waived	Department Head	
	Power of attorney for health care instrument	CR + 7 years	s. 155.30(3)	Waived	Department Head	
	Soldiers graves: record for the care of	CR + 7 years	s. 45.185(2)	Waived	Department Head	
	Veterans burials and record of financial assistance	CR + 7 years	s. 45.17	Waived	Department Head	
	Veterans service commission: individual members' surety bond	CR + 7 years	s. 45.12(2)	Waived	Department Head	
	Wills, living	CR + 7 years	s. 154.03(2)	Waived	Department Head	
	<b>Taxes</b>					
	<b>Records Series</b>					
	Apportionment of county taxes: record of	CR + 7 years	s. 70.63(1)	Waived	Department Head	
	Court certificates drawn on county treasurer	CR + 7 years	s. 66.081	Waived	Department Head	
	Illegal tax certificates charged back to local tax districts	3 years after charging back	s. 59.52(4)	Waived	Department Head	
	Local assessors: reports detailing the work of	CR + 7 years	s. 73.06(5)	Waived	Department Head	



<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Notice of application for tax deed: affidavits related to	CR + 7 years	s. 75.12(3)	Waived	Department Head	
	Notices of application for taking of tax deeds and certification of non-occupancy, proofs of service and tax certificates filed	CR + 15 years	s. 59.52(4)	Waived	Department Head	
	Receipts from every county officer, employee, board, commission or other body collecting or receiving money on behalf of the county	CR + 7 years or until audited,	s. 59.61(1)	Waived	Department Head	
	Receipts issued by treasurer: copies	CR + 4 years or until audited, whichever is earlier	s. 59.25(3), 59.52(4)	Waived	Department Head	
	Service of notice on owner of record of original title	CR + 7 years	s. 75.28(2)	Waived	Department Head	
	Tax Appeals Commission: appeals to	CR + 7 years	s. 70.64(6)	Waived	Department Head	
	Tax Appeals Commission: notice of hearing	CR + 7 years	s. 70.64(4)	Waived	Department Head	
	Tax apportionment notices sent to local taxing districts: copies	CR + 3 years	s. 59.52(4)	Waived	Department Head	
	Tax apportionment: notices from Secretary of State	CR + 3 years	s. 59.52(4)	Waived	Department Head	
	Tax deeds	CR + 7 years	s. 75.16	n/a	Department Head	
	Tax deeds: cancellation	CR + 7 years	s. 75.23	Waived	Department Head	
	Tax receipts	CR + 15 years	s. 59.52(4)	Waived	Department Head	
	Taxes levied on taxable property: statement of	CR + 7 years	s. 69.62	Waived	Department Head	
	Woodland tax law: copy of DNR action - request to place under law	CR + 7 years	s. 77.16(9)	Waived	Department Head	
	<b>General</b>					
	Any record subject to litigation, claim, audit or other action	Until permission to destroy obtained from corporation counsel	n/a	Waived	Department Head	
	Cancelled checks	CR + 7 years	s. 59.52(4)	Waived	Department Head	
	Correspondence	CR + 3 years	n/a	Waived	Department Head	
	Financial records	n/a	n/a	Notify	Department Head	

**COUNTY TREASURER  
ADDENDUM C**

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§ 19.33 Wis. Stats.)	<b>Notes</b>
	Accounts payable: detail listing & check register (copies)	CR + 3 years		Waived	Department Head	
	Appraisals, county-owned property	CR + 7 years		Waived	Department Head	
	Assessments: certified special assessment roll	Destroy after assessment collected or 7 years, whichever is longer		Waived	Department Head	
	Assessments, real property	CR + 7 years		Notify	Department Head	
	Assessments: statement of new special assessments	CR + 5 year		Waived	Department Head	
	Assessments: special assessment payment register	Destroy after all assessments collected or 7 years, whichever is longer		Waived	Department Head	
	Audit letters	CR + 3 years		Waived	Department Head	
	Balancing reports	CR + 3 years		Waived	Department Head	
	Bank credit/debit notices	1 year after audit		Waived	Department Head	
	Bank reconciliation	3 years after audit		Waived	Department Head	
	Bank statements	CR + 7 years		Waived	Department Head	
	Bankruptcies	CR + 7 years until superseded		Waived	Department Head	
	Cash books, daily	FIS + 3 years provided audit is complete		Waived	Department Head	
	Cash drawer reconciliation	1 year after audit		Waived	Department Head	
	Check register	CR + 7 years		Waived	Department Head	
	Checks, cancelled	CR + 7 years	s. 59.52(4)	Waived	Department Head	
	Checks, outstanding	CR + 7 years		Waived	Department Head	
	Correspondence, general	CR + 3 years		Waived	Department Head	
	Deposit tickets and books	1 year after audit		Waived	Department Head	
	Discontinued tax key numbers	Permanent		N/A	Department Head	
	Journal entries, resolutions, cash receipts, treasurer's cash	CR + 3 years		Waived	Department Head	
	Lottery cards, signed	4 years including credit year	Administrative Code Ch. 20.15(5)	Waived	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Probate fees report	7 years		Waived	Department Head	
	Receipts: general & settlement	CR + 7 years	s. 59.52(4)	Waived		
	Sale assessments	CR + 7 years		Waived	Department Head	
	Suit tax, monthly	CR + 7 years		Waived	Department Head	
	Tax deeds, foreclosure	CR + 15 years	s. 75.19, 75.195	Waived	Department Head	
	Tax receipts	CR + 15 years	s. 59.52(4)	Waived	Department Head	
	Tax rolls, municipal	CR + 15 years	s. 59.52(4)	Notify	Department Head	
	Tax sales records, including sale of tax deeded lands	CR + 7 years	s. 75.35	Notify for records prior to 1940. Waived for 1940 records & after.	Department Head	
	Wires, bank	7 years		Waived	Department Head	

**REGISTER OF DEEDS - PERMANENT  
ADDENDUM E**

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Annexation of territory by a city or village: related records		s. 66.021(8)(a)(e), 66.023(10)	Not applicable	Department Head	
	Annulment, divorce or legal separation judgment which affects title to real estate or liability for payment of support or maintenance		s. 767.255, 767.40(2)	Not applicable	Department Head	
	Appointment of any guardian or conservator appointed in any other state, district, territory or country together with a duly authenticated copy the appointment of the special guardian of such minor or incompetent person		s. 786.25(3)	Not applicable	Department Head	
	Armed forces: registration of all county persons who died in the services of the U.S. armed forces		s. 45.35(a)	Not applicable	Department Head	
	Articles of incorporation and amendments for mutual associations		s. 215.71(3)	Not applicable	Department Head	
	Articles of incorporation for capital stock associations and amendments		s. 215.61(3)	Not applicable	Department Head	
	Articles of incorporation for banking corporation and amendments		s. 221.03(3)	Not applicable	Department Head	
	Articles of incorporation; charter or patent of incorporation; certificate of organization or association of any corporation or joint stock company; articles of association or organization of any corporation; certificate or resolution for the purpose of amendment; every amendment in any form of the charter, patent, certificate or articles of association or organization or of the name, corporate powers or purposes of any corporation		s. 891.20	Not applicable	Department Head	
	Assessor's plats and amendments		s. 70.27(2)(8)	Not applicable	Department Head	
	Authorization to execute conveyances on behalf of a private corporation		s. 706.03(3)	Not applicable	Department Head	
	Bulkhead line, establishment of or reestablishment of an existing bulkhead line along shore of navigable		s. 30.11(3)	Not applicable	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	waters: map, description and ordinance					
	Business partnership agreements, amendments, articles of dissolution		s. 178.39	Not applicable	Department Head	
	Cemetery association (non-profit) certification resolutions and copy of proceedings		s. 157.062(9)	Not applicable	Department Head Department Head	
	Cemetery plat or map, records: order authorizing the vacating or replatting of the lands, record of a cataloged burial site		s. 157.07(1), 157.07(5), 157.70(2)(i)	Not applicable	Department Head	
	Census schedules		None	Not applicable	Department Head	
	Certificate of authorization to exercise fiduciary powers		s. 221.04(6)	Not applicable	Department Head	
	Certificate of conversion from a mutual association to a stock association or from a mutual savings and loan holding company to a stock savings and loan holding company		s. 215.58(3)	Not applicable	Department Head	
	Certificate reorganizing a mutual association as a mutual savings and loan holding company		s. 215.59(1)(g)	Not applicable	Department Head	
	Certificates of conversion from a mutual savings bank to a stock savings bank		s. 214.685(5)	Not applicable	Department Head	
	Certified survey map and corrections of		s. 236.34(1), 236.295(1)	Not applicable	Department Head	
	Chattel mortgages		None	Not applicable	Department Head	
	City condemnation and acquisition of property by cities, including report and plan of improvement, common council resolutions related to property		s. 32.55(3), 32.56(2), 32.57(7)(b)	Not applicable	Department Head	
	City: certificate showing that a city has established an official map		s. 62.23(6)(b)	Not applicable	Department Head	
	Condominium instruments: declaration, plats, and plans of a condominium and attached exhibits or schedules		s. 703.07(1)	Not applicable	Department Head	
	Contracts: credit sale of alcoholic dispensing equipment, share croppers		s. 125(33)(2)(e) 241.03(1)	Not applicable	Department Head	
	Conveyance and instrument affecting title to land in this state and index		s. 706.05(1), 706.05(7)	Not applicable	Department Head	
	Cooperatives: incorporation articles; contract between cooperative association and members terminations; weekly listing of all documents concerning cooperatives filed and recorded		s. 185.05(3), 185.42(1), 185.42(2)(5), 185.82(3)	Not applicable	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	by secretary of state					
	Corporate name: record of those using name, amendments, discontinuance		s. 134.17(1)	Not applicable	Department Head	
	Corporations (miscellaneous non-profit): fraternal societies, VFW posts and affiliates		s. 188.06, 188.11(1)	Not applicable	Department Head	
	Corporations (non-stock): articles of incorporation; articles of merger or consolidation; weekly listing of all non-stock corporation documents filed and recorded by the secretary of state		s. 181.32(1), 181.45(2), 181.67(3)(a)	Not applicable	Department Head	
	Corporations (religious): certificate of establishment; certificate of consolidation; incorporation articles and amendments; dissolution of corporation		s. 187.01(2), 187.14(4)(c), 187.16(1), 187.19(10)	Not applicable	Department Head	
	Corporations: resolution dissolving domestic corporation		s. 182.025(2)	Not applicable	Department Head	
	Credit Unions: incorporation articles and amendments; certificate to Credit Union commissioner stating incorporation articles have been filed; commissioner of Credit Union's order or certificate cancelling a Credit Union's charter		s. 186.35(1), 186.02(3)(a), 186.38(2), 186.315	Not applicable	Department Head	
	Daily report regarding system of tract indices or system of chain of title indices as required by county board of supervisors resolution		s. 59.43(12m)(c)	Not applicable	Department Head	
	Declaration of trust for domestic and alien corporations and amendments		s. 226.14(1)	Not applicable	Department Head	
	Deed: certificate of cancelled deed		s. 75.23	Not applicable	Department Head	
	Descent of property, judgment to determinate		s. 867.05(4)	Not applicable	Department Head	
	Discharge certificate from U.S. armed forces		s. 45.21	Not applicable	Department Head	
	Drainage district, orders of organization, assessment for costs on drainage lands, order laying out drain		s. 88.34(9), 88.40, 88.94(5)	Not applicable	Department Head	
	Estate transfer by will, intestacy or appointment, disclaimer of		s. 853.40(5)(e)	Not applicable	Department Head	
	Estates: Order settling small estates including those subject to claims of creditors		s. 867.01(3)(h), 867.02(2)(h)	Not applicable	Department Head	
	Estates: statement terminating joint tenancy of life estate		s. 867.04, 865.20(2)	Not applicable	Department Head	
	Execution and sale of real estate, certificate of		s. 815.38(1), 59.43(11)	Not applicable	Department Head	
	Exploration mining lease; and cancellation of		s. 107.20(1),	Not applicable	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
			107.25(2)			
	Farmland preservation agreement & relinquishment		s. 91.13(9), 91.19(5)	Not applicable	Department Head	
	Farms or country estates, registration of names		s. 59.76(1)	Not applicable	Department Head	
	Federal tax liens and certificates and notices affecting the liens and indexes		s. 779.97(2)(b)	Not applicable	Department Head	
	Forest croplands, order of entry, transfer, withdrawal		s. 77.02(3), 77.10(2)(a)2	Not applicable	Department Head	
	Forest land (managed): orders regarding		s. 77.82(8), 77.91(5)	Not applicable	Department Head	
	Forest lands (county): Order of entry, withdrawals		s.28.11(4)(d)(11)(a)	Not applicable	Department Head	
	Grantor/grantee index - index to real property records		s. 59.43(9)	Not applicable	Department Head	
	Highway (controlled access): finding, determination and declaration designating a highway or controlled-access highway; notice of any vacaion of a controlled-access highway		s. 53.027(1), 84.25, 83.027(13), 84.25(13)	Not applicable	Department Head	
	Highway assessments and apportionment on lands for county parks and parkways		s. 27.065(13)(c)	Not applicable	Department Head	
	Highway or street maps: map of proposed street or highway for purpose of widening, notice and map for right-of-way, alterations, etc.		s. 80.64, 84.295(10)(a)	Not applicable	Department Head	
	Highway register: county		s. 83.01(7)(g)	Not applicable	Department Head	
	Ice age trail areas: articles of dedication, amendments, revisions, withdrawal of articles		s. 23.293(15)(f), 23.293(15)(17)(e)	Not applicable	Department Head	
	Index for ancillary documents of a county with a population of 500,000 or more who has copied a document by microphotography, microfilm or optical imaging		s. 228.05	Not applicable	Department Head	
	Index of records or files kept in the register's office		s. 59.43(10)	Not applicable	Department Head	
	Industrial development agencies: articles of incorporation		s. 59.57(2)(e)(2)	Not applicable	Department Head	
	Inland lake protection and rehabilitation district, document authorizing creation of		s. 33.265	Not applicable	Department Head	
	Interest in property, statement or certificate confirming		s. 865.201(2), 865.046(1)(m)	Not applicable	Department Head	
	Judgment of declaration of interests in real property		s. 841.10(1)	Not applicable	Department Head	
	Land patents, U.S.		None	Not applicable	Department Head	
	Levy or writ of execution on real property		s. 815.195	Not applicable	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Lien for threshing, husking, baling		s. 779.50(3)	Not applicable	Department Head	
	Lien judgment		s. 75.521(14)	Not applicable	Department Head	
	Lien or mortgage, discharge order		s. 847.09	Not applicable	Department Head	
	Lien: certificate of redemption of judgment lien on loan		s. 851.64	Not applicable	Department Head	
	Liquidated insurer, documents relating to property of		s. 645.46(17)	Not applicable	Department Head	
	Lis pendens		s. 840.10(1), 59.43(11)	Not applicable	Department Head	
	Marital property agreements & related statements		s. 766	Not applicable	Department Head	
	Metro sewage district boundary: resolution to redefine		s. 66.888(1)(c)4b, 66.888(1)(d)3	Not applicable	Department Head	
	Mineral interests: statement of claim		s. 706.057(4)	Not applicable	Department Head	
	Mineral rights register consisting of conveyances of mineral interests		s. 706.055	Not applicable	Department Head	
	Monuments: survey conducted to erect monuments		s. 60.84(4)	Not applicable	Department Head	
	Mortgage liens upon public utilities & satisfaction of mortgage lien		s. 66.066(2)(b)	Not applicable	Department Head	
	Mortgage: certificate of discharge after foreclosure		s. 846.13	Not applicable	Department Head	
	[Mortgage] title: evidence of right of creditor to acquire		s. 815.53(4)	Not applicable	Department Head	
	Name change: certified copy of order and indexes		s. 786.36	Not applicable	Department Head	
	Natural areas heritage program: articles of dedication, amendments, withdrawals		s. 23.29(16)(18)(f), 23.29(20)(e)	Not applicable	Department Head	
	Oaths of office		s. 19.01(4)(d)	Not applicable	Department Head	
	Plat maps and corrections of		s. 236.02(10), 236.295(1)	Not applicable	Department Head	
	Plat maps: notification to authorities to approve or permitted to object to the final plat that has been recorded		s. 236.26	Not applicable	Department Head	
	Plat maps: resolution of municipality to waive its right to approve plats and resolution to rescind waiver		s. 236.10(5)	Not applicable	Department Head	
	Power of attorney		s. 813.23(1)(b)	Not applicable	Department Head	
	Probate judgment assigning an interest in real property upon closure of estate		s. 863.29(1)	Not applicable	Department Head	
	Proof of age (duplicate or certified copy)		s. 889.28	Not applicable	Department Head	
	Public land: notice of pending application to lay out, widen, or vacate a public place		s. 840.11(1)	Not applicable	Department Head	
	Public lands: abstract and records of all proceedings		s. 59.71	Not applicable	Department Head	



<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	relating to the laying out, widening, extending or vacating any street, alley, water channel, park, highway or other public place by any court, county board, common council, village board or town board					
	Public lands: annulment of certificates and patents		s. 24.35	Not applicable	Department Head	
	Rail property: release of first right to acquire by DOT		s. 85.09(5)(b)	Not applicable	Department Head	
	Railroads: map showing proposed route		s. 190.10(1)	Not applicable	Department Head	
	Railroads: surveyed map and certificate of the alteration or change of routes		s. 191.20	Not applicable	Department Head	
	Real estate liens: payment affidavit for prior liens		s. 779.98(3)	Not applicable	Department Head	
	Real estate owners subject to building codes		s. 62.17(1)	Not applicable	Department Head	
	Real estate transfers		s. 77.29	Not applicable	Department Head	
	Real estate: order confirming the sale of real estate of wards or incompetents		s. 786.07	Not applicable	Department Head	
	Real property: affidavit of publication of sale		s. 985.12(3)	Not applicable	Department Head	
	Release of power of appointment over legal or equitable interests in real or personal property		s. 702.09(3)(d)	Not applicable	Department Head	
	Rental units: certificates, waivers, stipulations relating to		s. 101.122(6)	Not applicable	Department Head	
	Retrocession of jurisdiction, documents concerning		s. 1.031	Not applicable	Department Head	
	Savings bank: articles of incorporation of a savings bank and amendments		s. 214.25(5)	Not applicable	Department Head	
	School district: resolution by two or more school districts to establish an alternative method of governing assets and liabilities		s. 66.03(2c)(b)	Not applicable	Department Head	
	Security interest in personal property or goods or in crops growing or to be grown: financing statement or other document evidencing the creation of the security interest		s. 409.401(1)(a), 409.402(1)(b), 409.402(9), 59.43(1)(n)	Not applicable	Department Head	
	Security interest upon certificate of title of motor vehicles and boats, memoranda regarding		s. 30.572(4)(5), 342.20(3)	Not applicable	Department Head	
	Security interests: financing statements, amendments, termination statements, continuation statements, statements of assignment and statements of release		s. 409.404(1)(a), 409.405(2), 409.410(1)	Not applicable	Department Head	
	Sewer and transportation facilities, record of damage awards by condemnor		s. 32.05(7)(c)	Not applicable	Department Head	
	Share croppers' contracts		s. 241.03(1)	Not applicable	Department Head	
	Solar access rights: notice granting permit, notice		s. 66.032(6)(b),	Not applicable	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	terminating rights, waiver of rights by permit holder		66.032(9)(c), 66.032(10)			
	Solid waste disposal facility or a hazardous waste facility: notation of the existence of		s. 144.44(4)(b), 59.43(1)(q)	Not applicable	Department Head	
	Surety company bond		s. 344.36(2)	Not applicable	Department Head	
	Surplus state-owned real property, agreement of transfer		s. 16.375(4)	Not applicable	Department Head	
	Surveyor's records, field notes			Not applicable	Department Head	
	Time-share instrument and amendments; termination agreement		s. 707.21(3), 707.24(2)(b)	Not applicable	Department Head	
	Town boundary or name change: order or ordinance		s. 59.17(12), 59.23(2)(k)	Not applicable	Department Head	
	Town mutual corporate documents		s. 612.81, 59.43(12)(b)	Not applicable	Department Head	
	Town sanitary districts: order of establishment referendum and resolutions to consolidate districts		s. 60.71(7), 60.785(2)(a)	Not applicable	Department Head	
	Towns: record of non-compliance with zoning ordinance		s. 60.61(5)b	Not applicable	Department Head	
	Tract index		s. 59.43(12m)(a)	Not applicable	Department Head	
	Trademarks, labels, badges, statement or description of		s. 132.04	Not applicable	Department Head	
	Trusts: disclaimer of real property or an interest in real property		s. 701.27(5)(e)	Not applicable	Department Head	
	Trusts: letters of trust for a foreign trustee [named in a will]		s. 701.16(1)(d)	Not applicable	Department Head	
	Village: petition for dissolution of a village and election results on question of		s. 61.187(2)	Not applicable	Department Head	
	Village records: papers, documents and orders relating to the organization and incorporation or the alteration of the boundaries of any village		s. 891.10	Not applicable	Department Head	
	Vital records: certificate of birth, death, divorce or annulment, marriage documents & related data plus indexes		s. 69.01(15)(a), 59.43(1)(h)	Not applicable	Department Head	
	Woodland tax lands: entry, declassification of; tax law classification		s. 77.16(3)(7)(9)	Not applicable	Department Head	
	Writ of attachment and related records; discharge or attached real estate; certificate of judgment or satisfaction on money or property held by writ of attachment		s. 59.43(11), 811.11, 811.17, 811.22	Not applicable	Department Head	

**REGISTER OF DEEDS - NON PERMANENT  
ADDENDUM E**

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Accounts payable	CR + 7 years		Waived	Department Head	
	Accounts receivable	CR + 7 years		Waived	Department Head	
	Accounts receivable, paid	CR + 2 years		Waived	Department Head	
	Airport protection plans, specifications and amendments	CR + 7 years	s. 114.135	Waived	Department Head	
	Any records subject to litigation, claim, audit or other action	Until permission to destroy obtained from Corp. Counsel		Waived	Department Head	
	Applications for certified copies	CR + 2 years		Waived	Department Head	
	As-built tracings	Life of project		Waived	Department Head	
	Bills of sale	CR + 6 years		Waived	Department Head	
	Blueprints	Until superseded by as-built tracings		Notify	Department Head	
	Breeding service: claim and payment for	CR + 7 years	s. 779.49(1)	Waived	Department Head	
	Cancelled checks	CR + 7 years	s. 59.54(16)	Waived	Department Head	
	Cash register tapes	CR + 2 years		Waived	Department Head	
	Certificates of old age assistance and indexes	CR + 7 years		Notify	Department Head	
	City record of officers and employees' surety bonds	CR + 7 years	s. 66.145	Waived	Department Head	
	City/Village: Reorganization of city as village, election returns on question of	CR + 7 years	s. 66.019(6)	Waived	Department Head	
	City/Village: lease of space by	CR + 7 years	s. 66.048(3)(c)	Waived	Department Head	
	Correspondence	CR + 3 years		Waived	Department Head	
	Equipment & furnishings inventories	Until superseded		Waived	Department Head	
	General information	CR + 7 years		Notify	Department Head	
	Guardian, petition for appointment of	CR + 7 years	s. 880.215	Waived	Department Head	
	Indigent defendants: certificate of legal fees paid by county or state	CR + 7 years	s. 757.66	Waived	Department Head	
	Insurance policies, claims made	7 years after expiration	s. 59.52(10)	Waived	Department Head	
	Insurance policies, occupancy	CR + 7 years	s. 59.52(10)	Waived	Department Head	
	Updated insurers' records	7 years after close of liquidation proceedings	s. 645	Waived	Department Head	
	Municipal redevelopment plan and revisions	CR + 7 years	s. 66.431(9)(a)1,	Notify	Department Head	
			66.431(11)(b)			
	Notice of removal of human corpse	2 months from date of death;		Waived	Department Head	

Record Series No.	Records Series Title	Retention Period	Authority (Creation, Retention & Disposition)	WHS Notification	Custodian (§19.33 Wis. Stats.)	Notes
		Dept. H&SS directive				
	Notification of failure to pay taxes and notification of balances due (veterans)	CR + 7 years	s. 45.53	Waived	Department Head	
	Order to suspend proceedings for collection of property taxes of property owned by veterans	CR + 7 years	s. 45.53(6)	Waived	Department Head	
	Purchase orders	CR + 7 years		Waived	Department Head	
	Raze order	CR + 7 years	s. 66.05(1)(d)	Waived	Department Head	
	Receipt journals	CR + 7 years		Waived	Department Head	
	Receipts	CR + 7 years		Waived	Department Head	
	Report for final disposition of corpse	2 years from date of death; Dept. H&SS directive		Waived	Department Head	
	Treasurers receipts	CR + 2 years		Waived	Department Head	
	UCC filings (fixture) 409.403(6); 409.402(5)	EVT = satisfaction of mortgage	s. 409.403(6), 409.402(5)	Waived	Department Head	
	UCC filings (non-fixture)	CR + 5 years	s. 409.403(3)	Waived	Department Head	
	UCC - 11, search copies	CR + 2 years		Waived	Department Head	
	Vital record, request for copy of	FIS + 1 year		Waived	Department Head	
	Vouchers order/register	CR + 7 years		Waived	Department Head	
	Wills, foreign: certificate of assignment	CR + 7 years	s. 868.05(2)	Waived	Department Head	
	Wills, notice that proceedings have been taken to contest the will	CR + 7 years	s. 868.01(3)	Waived	Department Head	

**DISTRICT ATTORNEY  
ADDENDUM F**

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
<b>District Attorney</b>						
	Breathalyzer Unit Certification	CR + 7 years	s. 978.07(1)(d)	Waived	Department Head	
	Check Complaints	CR + 7 years		Waived	Department Head	
	Check Ledger Cards	CR + 7 years		Waived	Department Head	
	Civil Cases	EVT + 3 years: EVT = Commencement of Action	s.978.07(1)(a), (1)(b)	Notify	Department Head	
	DNR (Dept. of Natural Resources) Citations	CR + 7 years		Waived	Department Head	
	Felony or Related Cases	EVT + 10 years: EVT = Case closed or mandatory release date reached, whichever is later	s. 978.07(1)(c)3	Notify	Department Head	
	Felony or related cases punishable by a maximum period of imprisonment equal to at least 20 years	EVT + 20 years: EVT = released or paroled, whichever is later	s. 978.07(1)(c)2	Notify	Department Head	
	Felony or related cases punishable by life imprisonment (aka homicide)	EVT + 50 years: released or paroled, whichever is later	s. 978.07(1)(c)1	Notify	Department Head	
	Grant reimbursement proposals (Victim Witness)	CR + 10 years		Waived	Department Head	
	Juvenile cases - JV/Juvenile Delinquency	EVT + 10 years: EVT = Juvenile's 17th birthday	SCR 72.03(2)	Waived	Department Head	
	Juvenile Consumption Files	EVT + 6 years: EVT = Final judgment	SCR 72.03(2)	Waived	Department Head	
	Juvenile DNR Citations	EVT + 6 years: EVT = Final judgment	SCR 72.03(2)	Waived	Department Head	
	Juvenile Municipal Citations	EVT + 3 years : EVT = Final judgment	SCR 72.03(2)	Waived	Department Head	
	Juvenile Truancy Violations/Citations	EVT + 6 years: EVT = Final judgment	SCR 72.03(2)	Waived	Department Head	
	Misdemeanor Cases	EVT + 3 years: EVT = Commencement of Action	s. 978.07(1)(a), (1)(b)	Waived	Department Head	
	Ordinance Violations	EVT + 3 years: EVT = Commencement of Action		Waived	Department Head	
	Parking Citations	EVT + 3 years: EVT = Commencement of Action	s. 978.07(1)(b)	Waived	Department Head	

<b>Record Series No.</b>	<b>Records Series Title</b>	<b>Retention Period</b>	<b>Authority</b> (Creation, Retention & Disposition)	<b>WHS Notification</b>	<b>Custodian</b> (§19.33 Wis. Stats.)	<b>Notes</b>
	Search Warrants	EVT + 6 years: EVT = Filed with	SCR 72.01(27)	Waived	Department Head	
	Subpoena Duces Tecum	CR + 7 years		Waived	Department Head	
	Traffic Cases	EVT + 3 years: EVT = Commencement of Action	s. 978.07(1)(b)	Waived	Department Head	
	Trust Account Audits, Monthly	EVT +6 years: EVT = Case	SCR 20(1-15) & s. 757.293(2)	Waived	Department Head	
	Vacation Schedule, Police Officers	CR + 7 years		Waived	Department Head	
	Vehicle Seizures	EVT + 3 years: EVT + Date of	s. 978.07(b)	Waived	Department Head	
	Victim/Witness Card Files	EVT + 6 years: EVT = Case Closed	s. 978.07(3)(d)	Waived	Department Head	
	Victim/Witness Cases	EVT + 6 years: EVT = Case	s. 978.07(3)(d)	Waived	Department Head	
	Victim/Witness Statistics Sheet, Closed	EVT + 6: EVT = Case Closed	s. 978.07(3)(d)	Waived	Department Head	
	Victim/Witness Volunteers and Schedules	CR + 7 years		Waived	Department Head	

# Legend

The following terms and abbreviations are used in the Jefferson County Records Retention Schedule:

**AT:** After termination

**C:** Confidential

**CR:** Creation or receipt (typically the retention is calculated from the creation or receipt of a record, plus the designated number of years)

**EVT:** Event (typically the retention is calculated from an event, such as the close of a case or end of the project, plus the designated number of years)

**FIS:** Fiscal (meaning the current fiscal year and the designated number of years)

**N:** Notify Wisconsin Historical Society before destruction

**N/A:** Not applicable

**P:** Permanent

**PII:** Personally Identifiable Information (has the meaning specified in §19.62(5) Wis. Stats.)

**S:** Until superseded

**W:** Waived Notification

**WHS:** Wisconsin Historical Society

**WPRB:** Wisconsin Public Records Board

## I. Historical Records

Notification to the Wisconsin Historical Society under §19.21(4)(a) Wis. Stats. requires notification sixty (60) days prior to the destruction of any record unless notification is waived in the Records Retention Schedule.

## II. Administration

### A. Custodian

Person empowered by statute (§19.33 Wis. Stats.) with the care and custody of public records, and tasked with the responsibility of compliance with Wisconsin's Public Records Law (§§19.31 – 19.39 Wis. Stats.). Unless otherwise designated in the schedule, the custodian is, as a rule, the: 1) department head or their permitted designee; 2) an elected official or their permitted designee; and 3) for the county board and for any committees, commissions, boards or authorities created by ordinance or resolution of the county board, the county clerk.

### B. Retention

Seven (7) years is the default retention period under §19.21(5)(c) Wis. Stats. if the retention period is not stated in the Retention Schedule. "Public records" and "record" have the meaning specified in §§16.61(2)(b) and 19.62(6) Wis. Stats. Destroy non-records when no longer needed or useful.

### C. Confidentiality

Records may contain non-public confidential information. A custodian has an obligation to protect the confidentiality of such information. Records may also contain personally identifiable information under §19.62(5) Wis. Stats. Custodians may have a duty to protect personal privacy.

#### D. Disposition (i.e., Destruction or Transfer)

1. Dispose of (destroy or transfer) records when the minimum retention period expires.
2. Records retained beyond the minimum retention period are susceptible to disclosure and discovery in the context of audits, litigation, and/or public records request.
3. Before destruction a Sixty (60) day prior written notice of destruction must be given to the Wisconsin Historical Society (WHS) pursuant to §19.21(5)(d) Wis. Stats. This does not apply to any record listed in the schedule and designated “waived.” Determine if litigation/audit/public records request is pending. If so, place a “hold” on records (i.e., cease all disposition activity) until: after the public record request is granted or 60 days after request is denied (§19.35(5) Wis. Stats.) *or* until any litigation or audit is fully and finally resolved.

### **III. Electronic Records / Electronically Stored Medium**

The content, not the format or medium, determines whether a record is a public record, but the format or medium does matter with respect to retention and disposition. Transfer of records to optical disk or electronic storage are authorized pursuant to §16.61(7) Wis. Stats. and §10.03(2)(b)10 of the Jefferson County ACCESS TO PUBLIC RECORDS ordinance. In that case, the destruction of the original record is authorized and the record generated from optical imaging or electronic formatting of an original record is considered the original record.

*Any questions can be directed to the Jefferson County Corporation Counsel Office at (920) 674-7135 or [corpc@jeffersoncountywi.gov](mailto:corpc@jeffersoncountywi.gov)*