

ORDINANCE 14-0901
Revised Records Retention Schedule

WHEREAS, the Personnel and Labor Relations Committee has general oversight of all countywide policies and procedures; and

WHEREAS, after review of the Green County Code and the Wisconsin Statutes, the Green County Personnel and Labor Relations Committee believes that the Green County Code is in need of updating as it relates to the record retention schedule; and

WHEREAS, in 2010, the Wisconsin Counties Association's Records Retention Task Force established a Records Retention/Disposition Schedule (Schedule) that is tailored to Wisconsin counties, is comprehensive and flexible, is in compliance with legal mandates and has been approved by the Wisconsin Public Records Board (WPRB), and

WHEREAS, adopting the WPRB approved Schedule does not obligate the county to create a record (i.e., airport records), it only requires the county to follow the Schedule if such records exist (i.e., county has created or received such records); and

NOW, THEREFORE, BE IT ORDAINED by the Green County Board of Supervisors, in legal session assembled, that Title 1, Chapter 12 of the Green County Code be repealed in its entirety and replaced as is attached.

FURTHER, the County Clerk is directed to send the original and two copies of the required Notification of Adoption forms to the State Archivist, State Historical Society of Wisconsin, 816 State Street, Madison, Wisconsin 53706-1488.

FURTHER, new Title 1, Chapter 12 of the Green County Code will become effective upon execution of the Notification of Adoption forms by the State Archivist and Executive Secretary of the State Public Records Board, or publication, whichever occurs last.

SIGNED: PERSONNEL AND LABOR RELATIONS COMMITTEE

Arthur Carter, Chair

Harvey Mandel, Vice-Chair

Dennis Dalton

Pat Davis

Ray Francois

Herb Hanson

Steve Stettler

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FISCAL NOTE: No fiscal impact. MJD

LEGAL NOTE: Modifications made by Corporation Counsel to model retention schedule have been informally approved by Historical Society of Wisconsin. BDB

STATE OF WISCONSIN)
) ss.
COUNTY OF GREEN)

I, Michael J. Doyle, County Clerk in and for said County, do hereby certify that the above and foregoing is a true and correct copy of Ordinance 14-0901 adopted by the Board of Supervisors on September 9, 2014.

Dated at Monroe, Wisconsin this 9th day of September, 2014.

Michael J. Doyle, Green County Clerk

**CHAPTER 12
RECORDS RETENTION**

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1-12-1: PURPOSE

The purpose of this chapter is to establish a county record retention schedule and authorize destruction of county records pursuant to the schedule on an annual basis. Records custodians may destroy a record prior to the time set forth in the schedule only if such a record has been reproduced as an original record pursuant to §§16.61(7) and 16.612 Wis. Stats. Any record not covered by this chapter or any other regulation or law shall be retained for 7 years unless the record is added by amendment to this Chapter and the shorter period is approved by the Wisconsin Public Records Board.

1-12-2: LEGEND

The following terms and abbreviations are used in the records retention schedule:

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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)

P: Permanent

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

S: Until superseded

WHS: Wisconsin Historical Society

WPRB: Wisconsin Public Records Board

1-12-3: HISTORICAL RECORDS

The Wisconsin Historical Society has waived the required sixty day notice under § 19.21(5)(d) Wis. Stats. for any record marked “W” (waived notice). WHS must be notified prior to destruction of a record marked “N” (non-waived). Notice is also required for any record not listed in this chapter. “N/A” indicates not applicable and applies to any county record designated for permanent retention.

1-12-4: DEFINITIONS

AUTHORITY: Means authority as defined in §19.32, Wis. Stats. as follows:

(1) “Authority” means any of the following having custody of a record: a state or local office, elected official, agency, board, commission, committee, council, department or public body corporate and politic created by constitution, law, ordinance, rule or order; a governmental or quasi-governmental corporation except for the Bradley sports and entertainment corporation; a local exposition district under Subch. II of Ch. 229; a family care district under §46.2895; any court of law; the assembly or senate; a nonprofit corporation which receives more than 50% of its funds from a county or municipality, as defined in §59.001(3), and which provides services related to public health or safety to the County or municipality; a nonprofit corporation operating the Olympic ice training center under §42.11(3); or a formally constituted subunit of any of the foregoing.

(1m) “Person authorized by the individual” means the parent, guardian, as defined in §48.02(8), or legal custodian, as defined in §48.02(11), of a

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child, as defined in §48.02(2), the guardian, as defined in §880.01(3), of an individual judged incompetent, as defined in §880.01(4), the personal representative or spouse of an individual who is deceased or any person authorized, in writing, by the individual to exercise the rights granted under this Section.

(1r) “Personally identifiable information” has the meaning specified in §19.62(5), Wis. Stats.

(2) “Record” means any material on which written, drawn, printed, spoken, visual or electromagnetic information is recorded or preserved, regardless of physical form or characteristics, which has been created or is being kept by an authority. “Record” includes, but is not limited to, handwritten, typed or printed pages, maps, charts, photographs, films, recordings, tapes (including computer tapes), computer printouts and optical disks). “Record” does not include drafts, notes, preliminary computations and like materials prepared for the originator’s personal use or prepared by the originator in the name of a person for whom the originator is working; materials which are purely the personal property of the custodian and have no relation to his or her office; materials to which access is limited by copyright, patent or bequest; and published materials in the possession of an authority other than a public library which are available for sale, or which are available for inspection at a public library.

(3) “Requester” means any person who requests inspection or copies of a record, except a committed or incarcerated person, unless the person requests inspection or copies of a record that contains specific references to that person or his or her minor children for whom he or she has not been denied physical placement under Ch. 767, and the record is otherwise accessible to the person by law.

**LEGAL
CUSTODIANS:**

Means legal custodians as defined in §19.33, Wis. Stats.:

(1) An elected official is the legal custodian of his or her records and the records of his or her office, but the official may designate an employee of his or her staff to act as the legal custodian.

(2) Unless otherwise prohibited by law, the County Clerk or the Clerk’s designee shall act as legal custodian for the County Board and for any Committees, Boards, or Authorities created by ordinance or resolution of the County Board. The County Clerk shall make any designations under this subsection in writing and display a list of designees together with the information required to be displayed as procedural information, as defined in this Chapter.

(3) For every authority not specified in Subsections (1) or (2), the authority’s chief administrative officer is the legal custodian for the authority, but the officer may designate an employee of his or her staff to act as the legal custodian.

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(4) Each legal custodian shall name a person to act as legal custodian in his or her absence or the absence of his or her designee. This subsection does not apply to members of the County Board.

(5) The designation of a legal custodian does not affect the powers and duties of an authority under this subchapter.

RDA: Means Retention/Disposition Authorization.

PROCEDURAL INFORMATION: Pursuant to §19.34, Wis. Stats., and the guidelines listed therein, each authority shall adopt, prominently display and make available for inspection and copy at its offices, for the guidance of the public, a notice containing a description of its organization and the established times and places at which, the legal custodian under §19.33 from whom, and the methods whereby, the public may obtain information and access to records in its custody, make requests for records, or obtain copies of records, and the costs thereof. This subsection does not apply to members of the County Board.

ACCESS TO RECORDS; FEES: (1) The rights of any person who requests inspections or copies of a record are governed by the provisions and guidelines of §§19.35 to 19.39, Wis. Stats.

(2) Fees

a. Each authority shall impose a fee upon the requester of a copy of a record which may not exceed the actual, necessary and direct cost of reproduction and transcription of the record, unless a fee is otherwise specifically established or authorized to be established by law.

b. Each authority shall impose a fee upon the requester of a copy of a record for the actual, necessary and direct cost of photographing and photographic processing if the authority provides a photograph of a record, the form of which does not permit copying.

c. Except as otherwise provided by law or as authority to be prescribed by law, an authority shall impose a fee upon a requester for locating a record, not exceeding the actual, necessary and direct cost of location, if the cost is \$50.00 or more.

d. Each authority shall impose a fee upon a requester for the actual, necessary and direct cost of mailing or shipping of any copy or photograph of a record which is mailed or shipped to the requester.

e. An authority may provide copies of a record without charge or at a reduced charge where the authority determines that waiver or reduction of the fee is in the public interest.

f. Each authority may require prepayment by a requester of any fee or fees imposed under this subsection if the total amount exceeds \$5.00.

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(3) Each authority in acting upon a request for any record shall respond within the times and according to the procedures set out in §19.35(4), Wis. Stats.

SEPARATION OF INFORMATION: If a record contains information that may be made public and information that may not be made public pursuant to §19.36, Wis. Stats., the authority having custody of the records shall provide information that may be made public and delete the information that may not be made public from the record before release. Each authority shall consult with the County Corporation Counsel before releasing any information under this subsection.

1-12-5: GENERAL

All Green County records for which a specific retention period is not established by State Statutes, Administrative Code, Federal law or regulation, shall be retained by Green County for a period of not less than 7 years, unless another retention period is designated in this Chapter.

1-12-6: DESTRUCTION AFTER REQUEST FOR INSPECTION

No record, which has been requested by the public, may be destroyed until after the request is granted or 60 days after the request is denied. If an action is commenced under §19.37, Wis. Stats., the requested record may not be destroyed until a court order is issued and all appeals have been completed. See §19.35(5), Wis. Stats.

1-12-7: DESTRUCTION PENDING LITIGATION OR AUDIT

No record subject to pending litigation or audit shall be destroyed until the litigation or audit has been resolved.

1-12-8: MICROFILMING OR OPTICAL DISK STORAGE OF DEPARTMENT RECORDS

Departments may keep and preserve public records through the use of microfilm or optical disk storage providing the applicable standards are established in §§16.61(7) and 16.612, Wis. Stats., respectively are met. (See also Dept. of Adm. Memo of 06/30/93 on imaging and Adm. 12, Wis. Adm. Code). Departments should consider factors such as retention periods and estimated costs and benefits of converting records between different media in deciding which records to microfilm or store on optical disk. After verification, paper records converted to either microfilm or optical disk storage should be destroyed. The retention periods identified in this Chapter apply to records in any media.

1-12-9: ANTIQUATED RECORDS

Obsolete, antiquated records which have no administrative use may be destroyed upon enactment of this ordinance after notice to the Wisconsin Historical Society.

1-12-10: GENERAL RETENTION SCHEDULE

The following records are maintained by the various departments in the County and are subject to uniform regulation unless otherwise specified. The retention period is listed with each record.

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The authority is listed where provided by law. Authority, where none is stated, is the ordinance itself.

1-12-11-A: GENERAL

Records Series Title	Retention Period	Authority	WHS
Accounts Payable (and supporting documents)	CR + 7 years		W
Accounts Receivable (and supporting documents)	CR + 3 years		W
Accrued Paid Leave Credit	S		W
Agendas	CR + 1 year		W
Agreements	7 years after last effective date thereof	§59.52(4)(a)10	W
Annual Reports	CR + 3 years		N
Any record subject to audit, claim, or litigation	Until permission to destroy is obtained from Corporation Counsel		
Artwork / Print Masters	S		W
As-Built Drawings	Life of Project		N
Audit (external)	CR + 7 years		W
Audit (internal)	S		W
Bank Deposits	CR + 7 years		W
Bank Statements / Reconciliations	CR + 7 years	§59.61	W
Boilerplate Forms	S		W
Blueprints (county facilities)	S		W
Budget (county)	CR +3 years		W
By-Laws	S		W
Calendars	S		W
Cash Register Tapes	CR + 7 years		W
Chart of Accounts (Object Codes)	CR + 3 years		W
Checks (cancelled / voided)	*CR + 7 years	§59.52(4)(a)16	W
Checks (duplicates, registers and/or logs)	CR + 7 years		W
Citations (copies)	CR + 2 years		W
Claims Made (general liability and property damage)	EVT + 3 years: EVT = Closure		W
Claims Paid (general liability and property damage)	EVT + 3 years; EVT = Payment	§59.52(4)(a)9	W
Code of Ethics (county)	S		W
Computer Printouts	S		W
Construction Plans (county facilities)	Life of Structure		N
Continuity of Operation (CCOP Plans)/ Continuity of Government (COG) Plans	S		W
Contracts	7 years after last effective date thereof	§59.52(4)(a)10	
Correspondence (general)	CR + 3 years		W

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Records Series Title	Retention Period	Authority	WHS
Directory Information	S		W
Fixed Assets	EVT + 1 year; EVT = Disposition		W
Fund Transfers	FIS + 4 years		W
Grant Information (application, denial, award, agreement, financial reports, and supporting documentation)	EVT + 4 years; EVT = Notification of Denial or Grant Completion		W
Indexes	S		W
Insurance Policies (to which the county is a party)	7 years after last effective date thereof	§59.52(4)(a)10	W
Inventories (equipment and furnishings)	S		W
Invitations to Bid/Requests for Proposal	7 years after completion of the work	§59.52(4)(a)10	W
Journal Entries/General Ledger	FIS + 4 years		N
Leases	7 years after last effective date thereof	§59.52(4)(a)10	W
Ledger Card Reports, EOM and EOY (BAS)	S		W
Legal Opinions	Permanent		W
Mailing Lists	S		W
Maintenance Service Request Form	EVT: EVT = Project Completion		W
Manual Warrants	CR + 1 year		W
Manuals (equipment)	Life of Asset		W
Master Project Files	CR + 20 years		W
Material Safety Data Sheets	EVT + 30 years: EVT = Date substance received	§101.583(1)(a)	W
Minutes (commissions, committees and boards)	CR + 3 years		N
Ordinances and Resolutions (enacted/adopted)	S		N
Organizational Charts	S		W
Payment Vouchers	FIS + 4 years		W
Payroll Records	CR + 3 years		W
Personnel (expenses)	S		W
Personnel (files)	EVT + 7 years: EVT = Separation from employment		W
Personnel (grievances)	EVT + 7 years: EVT = Case closed		W
Personnel (job descriptions)	S		W
Personnel (performance evaluations)	EVT + 7 years: EVT = Separation from employment		W
Personnel (recruitment and selection)	1 year from date of personnel action		W
Policy & Procedures Manual	S		W
Professional Affiliations/Associations	S		W
Purchase Orders	S		W

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Records Series Title	Retention Period	Authority	WHS
Purchase Requisitions	S		W
Receipts (Clerk's copy of Treasurer's)	CR + 4 years; or until audited, whichever is earlier	§59.52(4)(a)(12)	W
Receipts (general)	CR + 1 year	§59.52(4)	W
Receipts (money collected or received)	CR + 3 years: or until audited, whichever is earlier	§59.61(1)	W
Records Management Findings & Recommendations Report	S		W
Records Retention Schedules	S		W
Reference Materials (books, magazines, pamphlets, brochures, newsletters, etc.)	S		W
Reports (routine)	S		W
Service Receipts	CR + 2 years		W
Strategic Plan (county)	S		W
Studies - final draft	CR + 7 years		N
Supply Orders	EVT: EVT = Order filled, invoiced & paid		W
Surveillance Recordings (facility/non-evidentiary)	CR + 121 Days	§893.80	W
Survey	CR + 3 years		W
Telephone Logs/Message Slips/Voice Mail	S		W
Telephone Service Request Form	EVT: EVT = Project Completion		W
Tickler Files (follow-up)	S		W
Tracking Records (activity)	CR + 1 year		W
Training	S		W
Vendor Information	S		W
Vouchers / Order Register	*CR + 7 years		W
Warranty Records	Life of asset or end of warranty, whichever occurs first		W
Worker's Compensation Claims	EVT + 12 years: EVT = Later of injury, claim or closure	Ch. 102	W
* Time reduced to two (2) years if the original records are maintained in the Clerk or Treasurer's office.			

1-12-11-B: Child Support

Administrative Cost Claims	EVT + 3 years: EVT = Submission of last expenditure report	45 CFR 92.42 (b)(1) & DCF	W
Case Records	EVT + 7 years: EVT = Closure		W
Child Support Divorce	EVT + 7 years: EVT = Closure		W
Client Assistance (out of county)	CR + 7 years		W

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Records Series Title	Retention Period	Authority	WHS
Client Logs	S		W
Expenditure Reports & Supporting Documentation	CR + 3 years	45 CFR 74.20 - 74.25	W
IRS Records List	EVT + 7 years: EVT = Closure		W
Misdemeanor and Felony Non-Support Files	EVT + 7 years: EVT = Closure		W
Paternity Files, post judgments	EVT + 7 years: EVT = Closure		W
Paternity Files, pre-judgments, dismissed	CR + 3 years		W
Paternity Files, pre-judgments, not pursued	CR + 3 years		W
Reciprocal Support Cases (Interstate cases - i.e., UIFSA, URESA)	EVT + 7 years: EVT = Closure		W
Records of Required Client Notification	CR + 3 years	46 CFR 74.20 - 74.25	W
Statistical Reports & Supporting Documentation	CR + 3 years	45 CFR 74.20 - 74.25	W
Warrants & Capias	EVT + 3 years: EVT = Vacated, Served, or Closed		W

1-12-11-C: Corporation Counsel

Case files, litigation	EVT + 3 years: EVT = Closure or when appeal time has run, whichever is longer or per SCR		W
Case files, non-litigation	CR+3 years		W
CHIPS (Child in Need of Protective Services) Juvenile Records	EVT + 2 years: EVT = Child's 18th Birthday		W
CHIPS (Child in Need of Protective Services) Petitions	S		W
Department Files	CR + 3 years		W
Dismissals - 51.45	CR + 3 years		W
Guardianship Files	EVT + 7 years: EVT = Termination of Guardianship		W
Lawsuits and Habeas Corpus	EVT + 3 years: EVT = Closure or when appeal time has run, whichever is longer or per SCR		W
Legal Fees, Outside Counsel	EVT + 5 years: EVT = No activity		W
Legal Memoranda	Permanent		P
Legal Opinions	Permanent		P
Liability Claims	EVT + 7 years: EVT = Expiration		W
Mental Commitment Cases	EVT + 3 years: EVT = Closed		W

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Records Series Title	Retention Period	Authority	WHS
Ordinance Cover Sheets	EVT + 3 years: EVT = Board Approval		W
Parks and Land Use and Environmental Ordinance Enforcement Files	3 years after resolution		W
Real Estate Closing Files	Permanent		N/A
Termination of Parental Rights (TPRs)	EVT + 45 days: EVT = Child's 19th Birthday		W
Truancy Referrals	EVT + 1 year: EVT = Child's 18th Birthday		W
Union Contracts & Grievance, Mediation & Arbitration Records	Permanent		N/A

1-12-11-D: County Clerk

Administration			
Board and Commission Appointments/Confirmation (if required)	S	§§59.17(2)(c) and 59.18(2)(c)	W
Department Head Appointments/Confirmation (if required)	S	§§59.17(2)(b), (2)(br) and 59.18(2)(b)	W
Message to the Board	CR + 7 years	§§59.17(5) and 59.18(5)	W
Resolution or Petition and Referendum Creating the Office	S	§§59.17(1) and 59.18(1)	W
Resolutions or Ordinances - Approval or Veto	P	§59.17	N/A
Department Training Records	CR + 7 years		W
Directives & Policies	EVT + 7 years: EVT = Superseded or Terminated		W
EEO - 4 Reports	CR + 7 years		W
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		W
Performance Evaluations & Medical Records	CR + 6 years		W
Aid to immigration societies	CR + 7 years	§59.53(17)	N
Apportionment maps	Until next apportionment	§59.03	W
Audit reports	CR + 7 years		N
Bank statements	CR + 7 years	§59.61(3)	W
Bounty claims forwarded to DNR	CR + 1 year	§59.52(4)	W
Claims paid by county and supporting papers	CR + 7 years or until audited: whichever is earlier	§59.52(4)	W

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Records Series Title	Retention Period	Authority	WHS
Consolidation of counties: order for referendum or special election regarding	CR + 7 years	§59.08(7)	W
County contribution to the mosquito control district	CR + 7 years	§59.701(15)	W
County officers: appointment of	CR + 7 years	§§ 59.25(2) and 59.23(1), 17.21(6)	W
County orders uncalled for by the payee; list of	CR + 7 years	§59.64(4)	W
County zoning ordinance: petition for amendment of	CR + 7 years	§59.69(5)	W
Court commissioner: statement of all actions or proceedings	CR + 7 years	§§59.61(1), (3)	W
Court costs and fees	CR + 7 years	§814.22(2)	W
Crop reports by local assessors	CR + 3 years	§59.52(4)	N
Detachment of farm land from cities, entry of judgment	CR + 7 years	§62.075(5)	W
Equalization board proceedings or board of review	CR + 7 years		N
Farmland preservation agreements: application	CR + 7 years	§91.13(1)	W
Forest products: notice of cutting forest products	CR + 7 years	§26.03(1)(a)	W
Forfeiture: statements regarding the collection of and the payment to county treasurer	CR + 7 years	§778.15	W
Legislative documents, copies of	Retain until superseded by published statutes	§35.85(11)	W
Metropolitan Transit Authority annual report	CR + 7 years	§66.94(40)	W
Oaths of office: county officers	CR + 7 years	§§59.23(2) and 59.52(4)	W
Officers: town, city and village certified to county clerk	After date of expiration of term listed	§59.52(4)	N
Official bonds: county officers	CR + 6 years	§§59.17(14)(b) and 59.52(4)	W
Payment vouchers and disbursement made by county treasury	CR + 7 years or until audited, whichever is earlier	§59.69 4)	W
Publications fees	CR + 7 years	§985.065(2)(d)	W
Removals from office; testimony and proceedings	CR + 7 years	§17.16(8)(c)	N
Resignation of public officers	CR + 7 years	§17.01(5), (7)	W
Resolutions: agricultural use zoning ordinance	CR + 7 years	§91.73(3)	W
School tuition claims for nonresidents	CR + 7 years	§121.77(2)(a)	W
Town: order establishing a new town	CR + 7 years	§59.23(k)	N
Town: record of any alteration of boundaries or organization of town	CR + 7 years	§59.23(k)	N
Writs of certiorari	CR + 7 years	§753.04	W
County Board			
County board committee proceedings	CR + 7 years		N
County board meeting notices	CR + 7 years	§59.11	W

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Records Series Title	Retention Period	Authority	WHS
County board ordinances	CR + 7 years		N
County board proceedings: original papers, resolutions and reports concerning	6 years after date of publication	§59.717(1)	N
County board resolutions	CR + 7 years	§59.02(1)	N
Statistical report of county clerk to county board	CR + 2 years		N
Elections			
Absentee certificate-affidavit envelopes	90 days after date of local election and 22 months after Federal election	§7.23	W
All other election materials and supplies	90 days after date of local election and 22 months after Federal election	§7.23(1)(k)	W
Ballots, Federal	22 months after election	§7.23(1)(f)	W
Ballots, non-Federal	30 days after election	§7.23(1)(h)	W
Cancelled voter registration cards	4 years after cancellation	§7.23(1)(c)	W
Certificate of election	CR + 7 years	§7.60(6)	W
Certified lists of all candidates on file	90 days after date of local election and 22 months after Federal election	§7.08(2)(a)	W
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	§7.23(1)(g)	W
Disk or tape of election data	90 days after date of local election and 22 months after Federal election	§7.23(1)(g)	W
Election notices (types A-E and special elections), proofs of publication and correspondence	1 year after date of local election and 22 months after Federal election, unless contested, then by court order	§7.23(1)(j)	W
Election returns including inspector's statements, tally sheets, lists and envelopes	90 days after day of local election and 22 months after Federal election	§§7.23(1) and 7.51(5)	W
Election supplies	90 days after date of local election and 22 months after Federal election	§7.10(1)(a)	W
Electronic ballot tallies	90 days after day of local election and 22 months after Federal election	§7.23(1)(g)	W
Federal elections records other than registration cards	22 months after day of election	§7.23(1)(f)	W
Financial registration statements	6 years after date of termination of registrant	§7.23(1)(d)	W
Financial campaign reports	6 years after date of receipt	§7.23(1)(d)	W
Nomination papers for political party committee man or woman	90 days after date of election	§7.23(k)	W

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Records Series Title	Retention Period	Authority	WHS
Nomination papers--County offices, 1940 and after	90 days after election	§7.23(k)	W
Nomination papers--County offices, before 1940	N/A	§7.23(k)	N
Official canvasses including statements and determinations for local elections	10 years after date of election	§7.23(1)(i)	W
Official canvasses: votes cast for state and national offices	10 years after date of election	§7.23(1)(i)	W
Recount fee record	CR + 7 years	§9.01(1)(ag) 4	W
Registration and poll lists; non-partisan elections, 1940 and after	2 years after election	§7.23(1)(f)	W
Registration and poll lists; non-partisan elections, before 1940	N/A	§7.23(1)(f)	N
Registration and poll lists; partisan elections, 1940 and after	4 years after election	§7.23(1)(f)	W
Registration and poll lists; partisan elections, before 1940	N/A	§7.23(1)(f)	N
Registration and voting statistics	90 days after date of local election and 22 months after Federal election	§6.275(1)	N
Sample ballots	22 months after federal election and 30 days after non-federal election	§5.66(2)	W
Licenses			
Automobile registration lists	CR + 7 years	§341.17(4)(a)	W
Dog license fee records, reports	3 years provided the records have been audited	§174.08	W
Dog licenses and tags: related records	CR + 2 years	§174.07	W
Dog licenses: town and municipal treasurers' records of licenses sold and issued	CR + 3 years	§59.52(4)	W
Dogs: list of, kept in assessment district	CR + 2 years	§174.06(7)	W
Hunting, trapping, fishing licenses and other approvals	CR + 3 years	§29.09	W
License fee records: hunting, trapping, fishing	3 years provided the records have been audited	§29.09(7)(a)	W
Livestock: claims for damage by dogs	CR + 7 years	§174.11(1)	W
Marriage license applications and supporting papers	CR + 10 years	§59.52(4)	W
Marriage license docket	CR+ 7 years	§765.20	W
Marriage license receipts and records	CR + 7 years	§765.15	W
Marriage of underage persons, consent of guardian	CR + 7 years	§765.02(2)	W
Notice of stray animals	CR + 2 years	§170.02	W
Vehicles: applications for registration of	CR + 7 years	§341.08(5)	W
Public Lands and Roads			
Airport land: acquisition of, order and maps	CR + 7 years	§114.33(6)	N
Award of compensation pursuant to relocation orders	CR + 7 years	§32.05(7)(a)	W

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Records Series Title	Retention Period	Authority	WHS
Condemnation proceedings: assessments of benefits and damages made in	CR + 7 years	§27.065(2)(b)	W
Condemnation proceedings: publication of final determination as a class 2 notice	CR + 7 years	§27.065(6)(j)	W
County forest lands: easements; entry and withdrawal	CR + 7 years	§28.11(4)(d), (f)	W
County forest road aids; maps	CR + 7 years	§86.315(4)(a)	W
County highways; acquisition of land, order and map; construction, statements and payroll	CR + 7 years	§§83.08(1) and 83.04(4)	W
County highways; finding, determination, and declaration regarding controlled access	CR + 7 years	§83.027(1)	W
County improvement notice	CR + 7 years	§27.065(9)(a)	W
County park commissioners: appointment of	CR + 7 years	§27.02 (1)	W
County parks and parkways: final determination of damages and benefits; notice of appeal, liens against property, plans and specifications of contractors, special assessments	CR + 7 years	§27.065(5), (6), (8)-10)	W
District protection and rehabilitations, special assessments and changes	CR + 7 years	§33.32(1)(c)	W
Drainage district: transfer to other jurisdiction, petition and resolution	CR + 7 years	§88.83(4)	W
Flood works: petition for reports; notice of hearing	CR + 7 years	§§87.04(1) and 87.07(1)	W
Highway and road records, miscellaneous, before 1930	N/A		N
Highway jurisdiction maps	CR + 7 years	§86.302(1)	W
Leasing of land under the U.§ flood control act of 1954	CR + 7 years	§24.39(3)	W
Municipal power and water districts: resolutions of organization, public service commission reports, petitions, referendum results	CR + 7 years	§§198.03, 198.04 and 198.06	W
Notices to town assessors regarding lands sold and owned by county: copies	CR + 3 years	§59.52(4)	W
Petitions and objections regarding establishment of public land, inland lake protection and rehabilitation district	CR + 7 years	§§33.26(1) and 33.25(1)	W
Protest of proposed zoning amendment in airport affected area	CR + 7 years	§59.69(5)	W
Relocation orders	Retain latest revision for each project	§32.05(1)(a)	W
Resolution redefining metro sewage district boundary	CR + 7 years	§66.888(1)(d)	W
State trunk highways, county maps	CR + 7 years	§84.02(12)	N
Streets and parkways: adoption of grades and alterations	CR + 7 years	§27.065(3)	W
Town highways, petitions for immediate repair to culvert or bridge	CR + 7 years	§81.38(3)	W

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Records Series Title	Retention Period	Authority	WHS
Town highways: appropriations; appeals to county board	CR + 7 years	§§81.38(1), 88.83(4)	W
Zoning ordinance: adoption of	CR + 7 years	§59.61(5)	W
Social Services			
Aid: administration of and record of disbursements	CR + 7 years	§45.14(2)	W
Aid: application for, hearing and review	CR + 7 years	§49.50(8)(b)1, (9)(a)	W
Annual report: department of social services	CR + 7 years	§46.18(10)	W
Audit by state Department of Health and Social Services and administrative review of general relief agency	CR + 7 years	§§46.206(1)(c) and 46.208(2)(m)	W
Audits of claim against county	CR + 7 years	§46.18	W
Bonds furnished by conservator of county hospital patient or county home resident or guardian for mentally ill patient	CR + 7 years	§880.295(1)	W
Cemetery care funds	CR + 7 years	§157.11(9g)(a) 2.	W
Clerk of Court for juvenile matters: appointment of	CR + 7 years	§48.04(1)	W
Power of attorney for health care instrument	CR + 7 years	§155.30(3)	W
Soldiers graves: record for the care of	CR + 7 years	§45.185(2)	W
Veterans service commission: individual members' surety bond	CR + 7 years	§45.12(2)	W
Wills, living	CR + 7 years	§154.03(2)	W
Taxes			
Apportionment of county taxes: record of	CR + 7 years	§70.63(1)	W
Court certificates drawn on county treasurer	CR + 7 years	§66.081	W
Illegal tax certificates charged back to local tax districts	3 years after charging back	§59.52(4)	W
Local assessors: reports detailing the work of	CR+ 7 years	§73.06(5)	W
Notice of application for tax deed: affidavits related to	CR + 7 years	§75.12(3)	W
Notices of application for taking of tax deeds and certification of non-occupancy, proofs of service and tax certificates filed	CR + 15 years	§59.52(4)	W
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, whichever is earlier	§59.61(1)	W
Receipts issued by treasurer: copies	CR + 4 years or until audited, whichever is earlier	§§59.25(3) and 59.52(4)	W
Service of notice on owner of record of original title	CR + 7 years	§75.28(2)	W
Tax Appeals Commission: appeals to	CR + 7 years	§70.64(6)	W
Tax Appeals Commission: notice of hearing	CR + 7 years	§70.64(4)	W
Tax apportionment notices sent to local taxing districts: copies	CR + 3 years	§59.52(4)	W

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Records Series Title	Retention Period	Authority	WHS
Tax apportionment: notices from Secretary of State	CR + 3 years	§59.52(4)	W
Tax deeds	CR + 7 years	§75.16	N/A
Tax deeds: cancellation of	CR + 7 years	§75.23	W
Tax receipts	CR + 15 years	§59.52(4)	W
Taxes levied on taxable property: statement of	CR + 7 years	§69.62	W
Woodland tax law: copy of DNR action - request to place under law	CR + 7 years	§77.16(9)	W
General			
Any record subject to litigation, claim, audit or other action	Until permission to destroy obtained from Corporation Counsel		W
Cancelled checks	CR + 7 years	§59.52(4)	W
Correspondence	CR + 3 years		W
Financial records			N

1-12-11-E: County Treasurer

Administrative			
Accounts payable: detail listing & check register (copies)	CR + 3 years		W
Appraisals, county-owned property	CR + 7 years		W
Assessments: certified special assessment roll	Destroy after assessment collected or 7 years, whichever is longer		W
Assessments, real property	CR + 7 years		N
Assessments: statement of new special assessments	Cr + 5 years		W
Assessments: special assessment payment register	Destroy after all assessments collected or 7 yrs, whichever is longer		W
Audit letters	CR + 3 years		W
Balancing reports	CR + 3 years		W
Bank credit/debit notices	1 year after audit		W
Bank reconciliation	3 years after audit		W
Bank statements	CR +7 years		W
Bankruptcies	CR + 7 years until superseded		W
Cash books, daily	FIS + 3 years provided audit is complete		W
Cash drawer reconciliation	1 year after audit		W
Check register	CR + 7 years		W
Checks, cancelled	CR + 7 years	§59.52(4)	W
Checks, outstanding	CR + 7 years		W
Correspondence, general	CR + 3 years		W

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Records Series Title	Retention Period	Authority	WHS
Deposit tickets and books	1 year after audit		W
Discontinued tax key numbers	Permanent		N/A
Journal entries, resolutions, cash receipts, treasurer's cash	CR + 3 years		W
Lottery cards, signed	4 years including credit year	TAX 20.15 (5)	W
Probate fees report	7 years		W
Receipts: general & settlement	CR + 7 years	§59.52(4)	W
Sale assessments	CR + 7 years		W
Suit tax, monthly	CR + 7 years		W
Tax deeds, foreclosure	CR + 15 years	§§75.19 and 75.195	W
Tax receipts	CR + 15 years	§59.52(4)	W
Tax rolls, municipal	CR + 15 years	§59.52(4)	N
Tax sales records, including sale of tax deeded lands	CR + 7 years	§75.35	*
* N for records prior to 1940, W for records 1940 and after			
Wires, bank	7 years		W
Land Information System			
Aerial Photographs	Permanent		N/A
Assessors Plats	Permanent		N/A
Award of Damage for Scenic Rights	EVT: EVT = Recorded		W
Cadastral Maps	Permanent		N/A
Certified Mileage Lists	S		W
County Development Plan	S		N
Grant Application	CR + 10 years		W
Grant Contract Work Project Documentation	CR + 10 years		W
Hauler Licenses / Applications	EVT + 2 years: EVT = Renewal		W
Land Information Plan	Permanent		N
Parcel Maps for Tax Records	CR +10 years		W
Relocation of Orders / Maps	S		W
Report of Functional Jurisdiction of Roads	EVT + 10 years: EVT = Next Report Received		W
Town Plats	CR + 3 years		W
Waste Management Plan	S		W
Water Quality Approval Letters	Permanent		N/A

1-12-11-F: Court Records

The retention and disposal of all court records is governed by Section 757.54 Wisconsin Statutes and Chapter SCR 72, which are incorporated herein by reference as presently constituted or hereafter revised.
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 DCF and/or DHS.

Ordinance 14-0901*Revised Records Retention Schedule*

Records Series Title	Retention Period	Authority	WHS
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1-12-11-G: District Attorney

District Attorney records are governed by state record retention schedules under Section 978.07 Wisconsin Statutes.

1-12-11-H: Emergency Management

Claims Arising During State of Emergency	CR + 121 days	§§257.03 and 893.82	W
Declaration of Emergency (Proclamation, Resolution and/or Ordinance)	CR + 7 years	§§323.11 and 323.14(4)	W
Emergency Management Plan	S	§323.14(1)	W
Emergency Planning Grants	CR + 7 years	§323.61	W
Hazardous Substance Information	CR + 7 years	§323.60 , C.E.R.C.L.A., E.P.C.R.A., and S.A.R.A.	W
Hazardous Waste Department Investigations	CR + 3 years	NR 630.31(1)(f)	W
Local Emergency Planning Committee	S	§59.54(8)	W
Local Emergency Response Team - Reimbursement Claim	EVT + 5 years; EVT = Reimbursement	WEM 6.09	W
Mutual Assistance - State of Emergency	CR + 7 years	§66.0314(1)(a)	W
Worker's Compensation Claim	EVT + 12 years; EVT = Occurrence	Ch. 102 and §323.40	W

1-12-11-I: Finance

Balancing Report	FIS + 4 years		W
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		W
Canceled Bonds, Coupons, & Promissory Notes	EVT: EVT = Audited		W
Copies of Notices of Tax Apportionment Sent to Local Taxing Districts by County Clerk	FIS + 3 years	§59.52(4)(a)2.	W
Deferred Compensation Records	EVT + 8 years: EVT = End of Service		W
Equipment & Furnishings Inventories	S		W
Garnishment Records	FIS + 7 years		W
General Ledger	FIS + 7 years		N
General Ledger, Trial Balance	FIS + 7 years		W
Illegal Tax Certificates Charged Back to Local Tax Districts	EVT + 3 years: EVT = Charging Back	§59.52(4)(a)6.	W
Insurance Records	7 years after the last effective date thereof	§59.52(4)(a)10.	W

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Revised Records Retention Schedule

Records Series Title	Retention Period	Authority	WHS
Investment Records	FIS + 6 years		W
Notices of Tax Apportionment from Secretary of State	FIS + 3 years	§59.52(4)(a)1.	W
Payroll Registers, Other Payroll Report, & Social Security & Retirement Earnings Report	FIS + 7 years		W
Retirement Records	EVT + 8 years: EVT = End of Service		W
Time cards, Attendance Records, Salary Schedule	FIS + 7 years		W
Treasurer Cash	FIS + 7 years		W
Unemployment Compensation Payment Records	FIS + 3 years		W
Withholding Allowance Certificates, Employee Wage & Tax Statements, & Other Tax Records	FIS + 7 years		W
Community Development			
Annual Grant Application	CR + 3 years		W
Audits, community block grant	CR + 7 years	24CFR 570.502(a)(16)	W
Census Books	S		W
Environmental Reviews	CR + 7 years		N
Federal Regulations	S		W
Grant Awards	CR + 7 years	24CFR 570.502(a)(16)	W
Home Regulations	S		W
HUD Disaster Recovery Initiative Fund Files	CR + 5 years		W
HUD Grantee Performance Reports	CR + 7 years	24CFR 570.502(a)(16)	W
Labor Standard Projects	CR + 7 years	24CFR 570.502(a)(16)	W
Labor Standard Wage Files	CR + 7 years	24CFR 570.502(a)(16)	W
Sub Grantee Project Files - CDBG (Community Development Block Grant)	CR + 7 years	24CFR 570.502(a)(16)	W
Sub Grantee Project Files - Home	CR + 7 years	24CFR 570.502(a)(16)	W

1-12-11-J: Health Department

Administrative			
Accounts Receivable Client Records	EVT + 10 years: EVT = Audited		W
Agency Evaluations	CR + 7 years	§19.21	W
Agency Goals, objectives, short & long term strategic plans	CR + 7 years	§19.21	W
Audit Reports, Vendor	CR + 7 years		W
Background Checks	CR + 7 years		W

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Records Series Title	Retention Period	Authority	WHS
Bankruptcy Reports	CR + 7 years		W
CARS (Community Aids Reporting System) Reports	Permanent		N/A
Cash Grant Vouchers	CR + 7 years		W
Certification of Destruction (Records)	Permanent		N/A
Daily Activities Report	CR + 7 years	§19.21	W
Daily Deposit Spreadsheets	CR + 7 years		W
Employee Expense Accounts	CR + 7 years		W
Evening Security Logs	CR + 3 Months		W
Fiscal Records, Billing, Budget	CR + 7 years	§19.21	W
Grant Reconciliation Working Papers	Permanent		N/A
Grants	EVT + 4 years; EVT = Notification of Denial or Grant Completion		W
HIPPA Documentation (Health Insurance Portability and Accountability Act)	CR + 7 years	HIPAA	W
Hospital Fiscal Survey	Permanent		N/A
Incident / Injury Reports	CR + 7 years	§19.21	W
Inventories, facility and equipment	CR + 7 years	§19.21	W
Inventory, or non-expendable personal property	EVT + 7 years: EVT = Property disposed of	§19.21	W
Medicare Cost Report	Permanent		N/A
Mission Statement, Philosophy, Purpose	CR + 7 years	§19.21	W
Patient Billing Activity Logs	CR + 7 years		W
Policies and Procedures (Program related)	CR + 7 years	§19.21	W
Policies and Procedures (Records related)	EVT: EVT = Superseded or Record Series no longer Exists		W
Press Releases	CR +1 year		W
Purchase Orders EDS (Electronic Data Storage)	CR + 7 years		W
Reconciliation Working papers	Permanent	HHS 54.06 (2)(a)(6)	N/A
State Reports (942/943)	Permanent		N/A
Taped meeting minutes	EVT + 90 days: EVT = Approval date & publication	§19.21	W
W.I.C. Case Files	FIS + 3 years	7 CFR 246.25	W
W.I.C. State Reports	CR + 3 years		W
Client and/or Family Care			
Agency Program Evaluation	CR + 7 years	§19.21	W
Birth Certificate Information	EVT + 1 year: EVT = Receipt of Copy	§69.20(3)	W
Care Coordination: Adult	CR + 7 years	§19.21	W

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Records Series Title	Retention Period	Authority	WHS
Care Coordination: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21	W
Child Long Term Support - Autism Records	EVT + 7 years: EVT = Case Closed		W
Client Listing	CR + 1 Month		W
Client Record / Patient Care: Adult	CR + 7 years	§19.21	W
Client Record / Patient Care: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21	W
Clinic Record, blood pressure forms	CR + 7 years		W
Complaint Investigation Record	CR + 7 years		W
Family Care Record: Adult	CR + 7 years	§19.21	W
Family Care Record: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21	W
Health Check / Well Child: Adult	CR + 7 years	§19.21	W
Health Check / Well Child: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21	W
Health Fair Records	CR + 7 years		W
Home Care Record	EVT + 6 years: EVT = The month the cost report is filed with the intermediary, maintain even if program is discontinued		W
Lead Screens	CR + 7 years		W
Monthly Clinic Statistic Report	CR + 1 year		W
Monthly Nurses Calendar	CR + 1 year		W
Short Term Record: Adult	CR + 7 years	§19.21	W
Short Term Record: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21	W
Communicable Disease Records			
Clinic Record, STD Clinic	CR + 7 years		W
Communicable Disease Outbreak Records [DOH 4142 (Rev. 8/860 & is complete DOH 9081) (Original to State Epidemiologist)	EVT: EVT = Investigation is complete		W
Communicable Disease Reports (4151) - Local Copy (Original to State Epidemiologist): Adult	CR + 7 years		W
Communicable Disease Reports (4151) - Local Copy (Original to State Epidemiologist): Minor	EVT + 5 years: EVT = Minor reaches 18 years of age		W
Hep. B / TB Case Records	EVT + 30 years: EVT = Severance		W

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Records Series Title	Retention Period	Authority	WHS
Immunization Administration Record	Permanent	National Childhood Injury Act of 1986, s 2125 PHS Act at 42 U.S.C. § 300aa - 25 (Supp. 1987)	N/A
Immunization Record: Adult	CR + 7 years	§19.21	W
Immunization Record: Minor	EVT + 5 years: EVT = Minor reaches 18 years of age	§19.21	W
Referral Listing	CR +7 years		W
Signature of Person to Receive Vaccine or Person Authorized to Make Request for Immunization: Adult	CR + 10 years		W
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		W
STD Report (4343) - Local Copy (Original to State Epidemiologist: Adult)	CR + 7 years		W
STD Report (4343) - Local Copy (Original to State Epidemiologist: Minor)	EVT + 5 years: EVT = Minor reaches 18 years of age		W
Community Education			
Curriculum	CR + 7 years		N
Educational Materials	CR + 7 years		N
Evaluation	CR + 7 years		N
Program Materials	CR + 7 years		N
Health Hazard Investigations	CR + 7 years		W
Animal Bite Files	CR + 10 years	ATCP 13	W
Animal Bite Log	CR + 1 year		W
Animal Complaint Log	CR + 7 years		W
Block Grant	CR + 7 years		W
Colilert Culture Quality Control	CR + 5 years		W
Commercial Premise Files	Permanent		N/A
Fluoride Nitrate Test Results	CR + 5 years		W
Lead Inspections (Poisonous & Non-Poisonous)	Permanent		N/A
Premise Files	Permanent		N/A
Radon Grants	CR + 7 years		W
Radon Lab Results	CR + 7 years		W
Licensed Establishments Inspection Reports	CR + 3 years		W
On-Site Waste	EVT: EVT = System is abandoned		W
Variance Approvals	Permanent		N/A
Water Sample Reports	CR + 7 years		W

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Records Series Title	Retention Period	Authority	WHS
Well / Septic Permits	EVT: EVT = System is abandoned		W

1-12-11-K: Highway

Drug & Alcohol Testing Records	CR + 2 years		W
Fuel Usage Records	CR + 2 years		W
Heavy Equipment & Vehicle Inventory Ledger	S		W
Machinery, time sheets	EVT + 1 year: EVT = Machinery is replaced		W
Permits	Permanent		N/A
State Gas Reports	CR + 3 years		W
Stock Control Records	CR + 2 years		W
Vehicle Maintenance Histories	Life of Vehicle		W
Vehicle Usage Reports	CR + 2 years		W

1-12-11-L: Human Services

Administrative			
Agency Evaluations	CR + 7 years	§19.21	W
Agency Goals, objectives, short & long term strategic plans	CR + 7 years	§19.21	W
Incident / Injury Reports	CR + 7 years / EVT + 1 year: EVT = settlement		W
Inventories, facility & equipment	CR + 7 years	§19.21	W
Mission Statement, Philosophy, Purpose	CR + 7 years	§19.21	W
Program Policies & Procedures	CR + 7 years	§19.21	W
Fiscal			
Fiscal Records, Billing	EVT + 90 days: EVT = Approval & publication	§19.21	W
Grants	EVT + 7 years: EVT = Disposal of property	§19.21	W
Inventory, non-expendable personal property	CR + 7 years	§19.21	W
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 DDHS, set out below	§59.42(4)(a)18.	N

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Records Series Title	Retention Period	Authority	WHS
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	DCF 121	W W W
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	DCF 121	N N W
Fraud Referral Records			
a. Unfounded	EVT + 3 years: EVT = Determination Decision**	DCF 121	W
b. Founded - referred to D.A.	EVT + 7 years: EVT = Determination Decision**	DCF 121	W
c. Founded - other	EVT + 5 years: EVT = Determination Decision**	DCF 121	W
Third-party recovery records	EVT + 1 year: EVT = Case Closed**		W
** Recommend microfilming essential information			
JOBS participant records	EVT + 7 years: EVT = Last date of JOBS eligibility, therefore closed	DHS Admin. Memo 94-18	W
Social Service Case File			
a. State Required Case Documentation; initial contact sheet; notice of agency action; social services narrative; financial information; any other records documenting client eligibility & activity	EVT + 3 years: EVT = Case Closed	DHS Memo 82-1A	W
b. State Required & County Developed Case Documentation; assessment; or diagnostic forms; records & narratives; social and medical histories; copies of court reports pertinent to case; release of information forms; client or service agreements; forms & documentation of eligibility or financial status	EVT + 3 years: EVT = Case Closed	DCS Memo 92-12	W
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	W

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Records Series Title	Retention Period	Authority	WHS
Protective Payee	EVT + 7 years		W
Case Management Files	EVT + 7 years		W
Payee Miscellaneous Documents	EVT + 3 months: EVT = Audited		W
Child-Placing Agency			
a. Register, identifying information about children accepted for service or placement	Permanent	DHS 54.05(2)(a)1	N/A
b. Individual Case Records for each child served & his / her family	EVT + 7 years: EVT = Case closed		W
c. Individual Foster Home Records for each foster home used by the agency, which includes signed applications & agreements	CR + 7 years		W
d. Individual Records of Studied Adoptive Applicants	CR + 7 years		W
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	W
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	W
g. Adoption records; county agencies providing child welfare services under § 48.56 or child-placing agencies licensed under § 48.60, should follow the detailed procedures for adoption information search & disclosure detailed in DHS 53	Permanent	DHS 53.07(1)	N/A
Third-Party Recovery	CR + 7 years		W
Economic Support and Workforce Development			
Public Assistance Case Records and Other Record Materials (General)	EVT + 3 years; EVT = Date of Closing	Ch. 49, §59.52 (4)(a)18 , DCF 121, Income Maintenance Manual, and DCF and/or DHS directives	W
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 DCF and/or DHS instructs that the records may be destroyed, whichever is earlier.	Ch. 49, §59.52 (4)(a)18, DCF 121, Income Maintenance Manual, and DCF and/or DHS directives	W
***Records may not be subject to the foregoing retention requirements if scanned in the Electronic Case File (ECF), Client Assistance for Re-employment and Economic Support (CARES) or other DCF and/or DHS system. It is recommended that paper documents be retained for one week after scanning.			
Monthly Back-Ups	CR + 1 year		W

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Records Series Title	Retention Period	Authority	WHS
Special Back-Ups (end of tax processing, etc.)	CR + 7 years		W
Telephone Records: System Back-Up Records	CR + 15 days		W
Telephone Records: System Call Records	CR + 6 Months		W
Digital Case Photos	CR + 75 years		W
Eyewash Inspection / Waste Container Logs	CR + 5 years		W
Homicide or Suspicious Death Investigation Case Files	CR + 75 years		N
Medication Disposal Logs	CR + 10 years		W
Other investigation case files	EVT + 7 years: EVT = Litigation resolved or case closed		W
Outside Case Billing Log	CR + 10 years		W
Report for Final Disposition (other reportable)	CR + 3 years		W
Sharp Container Log	CR + 5 years		W
Senior Services			
Adult Day Care Records	CR + 3 years		W
Adult Day Care Tracking Statistics	EVT + 3 years: EVT = Audited		W
Area Agency on Aging Reports - includes nutritional meal program summary	CR + 7 years		W
Benefit Specialist Client Files	EVT + 7 years: EVT = File Closed	§§46.81, 59.52 and DHS 245.03	W
Benefit Specialist Report	S	§46.81	W
Client Assessments for Home Delivered Meals and Supportive Services	CR + 3 years		W
Client Donation Deposits	CR + 7 years		W
Client Files - includes complaints, HDM assessments and pre-authorizations	EVT + 7 years: EVT = File Closed	§59.52	W
Client Nutrition Site Changes, site counts and daily meal counts	CR + 4 years		W
Client Statements (Revenue Received)	CR + 3 years		W
Commission on Aging - business related materials	CR + 7 years		W
Complaint Grievance File	CR + 3 years		W
Congregate Billings	CR + 3 years		W
Congregate Participant Logs Book	CR + 7 years		W
Congregate Registration Forms	CR + 7 years		W
Contract Monitoring Files	CR + 7 years		W
Contract Provider Billing Reports, invoices	CR + 7 years		W
Contracts Not Related to Purchasing	CR + 3 years		W
Day Care Client Billings	CR + 7 years		W
Elder Abuse Reports	CR + 7 years	§46.90	W
Factors Database Program	S		W

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Records Series Title	Retention Period	Authority	WHS
Grant Applications	EVT + 4 years: EVT = Notification of Denial or Grant Completion		W
Grant Task Force	S		W
Greeter Program Files	CR + 3 years		W
Home Delivered Meals	CR + 7 years		W
Home Delivered Meals, monthly computer printout reports	CR + 3 years		W
Home Delivered Meals, tracking index cards	CR + 7 years	§46.85	W
Home Delivered Meals, volunteer mileage reports	CR + 7 years	§46.85	W
Home Delivery Meals, client charge log, daily activity log, and daily vendor order sheet	CR + 7 years		W
ID Applications	CR + 5 years		W
ID Receipts	CR + 5 years		W
ID Reconciliation Book	CR + 5 years		W
Information & Assistance (I & A) Files (EOY)	EVT + 7 years: EVT = Audited		W
Information & Assistance Phone Logs	CR + 7 years		W
Information Systems Capital Project Documents	CR + 2 years		W
Legal Action Files (Legal Action of Wisconsin)	S		W
Long Term Redesign Project	CR + 4 years		W
Medicare Vans, weekly billings	CR + 3 years	§85.21	W
Nutrition Checks	CR + 3 years		W
Nutrition Program Records	CR + 3 years		W
Nutrition Site, progress reports	CR + 3 years		W
Nutrition Site, quality control sheets	CR + 3 years		W
Nutrition Site, registrations	CR + 1 year		W
Preauthorization's, Service	EVT + 1 years: EVT = Termination		W
Program Monitor Evaluation (PME) Billing Reports, invoices	EVT + 7: EVT = Audited		W
Project Files, special events	CR + 7 years		W
Reports, specialized transportation / other	CR + 5 years		W
Senior Center Listing	CR + 5 years		W
Senior Dining Quality Control Sheets	CR + 7 years		W
Senior Dining Supply Usage Reports	CR + 7 years		W
Senior ID Log Book	CR + 5 years		W
Shared taxi Monthly Report	S		W
Statistics, operational and cost	CR + 5 years		W
Support Group and Doctors List	CR + 1 year		W
Taxi Program Analysis	CR + 3 years		W
Taxi Vouchers	EVT + 3 years: EVT = Audited	§85.21	W

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Records Series Title	Retention Period	Authority	WHS
Title XIX Billing Statements	CR + 7 years		W
Transit Data, Historical, specialized	EVT + 7 years: EVT = Settlement	§85.21	W
Transportation Contracts	CR + 3 years	§85.21	W
Volunteer Acknowledgement of Confidentiality	EVT + 3 years: EVT = Termination		W
Volunteer Card File	CR + 7 years	§46.85	W
Volunteer Driver Agreements	EVT + 3 years: EVT = Termination		W
Volunteer Elder Reach Files	CR + 3 years	§46.85	W
Volunteer Friendly Visitors Files	EVT + 3 years: EVT = Termination		W
Volunteer Monthly Reports	CR + 7 years	§46.85	W
Volunteer Registration Forms - Includes Confidentiality Driver's Statements	CR + 7 years		W
Volunteer Staff Log Book	S		W
Adolescent & Family Services / Juvenile			
Adolescent & Family Services Census Sheets	S		W
Adolescent & Family Services Client Index Card File	S		W
Adolescent & Family Services Client Listing	S		W
Adolescent & Family Services Client Logs	S		W
Adolescent & Family Services Client Records	EVT + 7 years: EVT = Youngest Child in household turns 19 years of age	DHS 92.12(2), (4)	W
Daily Staff Attendance Reports	CR +1 year		W
Daily Staff Schedule	CR + 2 years		W
Original Offense Report	CR + 2 years		W
Permission Slips (Residents)	CR + 2 years		W
Requests for Leave, employee	CR + 1 year		W
Resident Juvenile Case Files, secure	EVT + 10 years: EVT = Case Closed	§48.396, DHS 346.13 and SCR 72(41)	W
Resident Juvenile Case Files, shelter care	EVT + 7 years: EVT = Case Closed	§48.396 and DHS 59.07 (3)(b)	W
Resident Medical Treatment Records	CR + 7 years	DHS 92.12(1) & (2)(3)(4)	W
Resident Medication Log	S		W
Shelter Care Secure Admission Register	Permanent	DHS 54.06 (2)(a)(1)	N/A
Supervisor Shift Log	CR + 2 years		W
Unit Log (Male & Female)	CR + 2 years		W

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Revised Records Retention Schedule

Records Series Title	Retention Period	Authority	WHS
Intake Shared Services			
Certified Child Care Files	EVT + 7 years: EVT = Minor reaches 18 years of age		W
Child Abuse and Neglect / Child Welfare Client Records	CR + 7 years		W
Intake & Shared Services Client Records	EVT + 7 years: EVT = Youngest Child in Family turns 18 years of age	DHS Memo (82-1A)	W
Intake Access Contact Listing	CR + 2 years		W
Kinship Care Client Records	EVT + 7 years: EVT = Minor reaches 18 years of age		W
Long Term Care			
Long Term Care Client Listing	EVT + 1Month: EVT = Transfer to Electronic Record		W
Long Term Care Client Log	S		W
Long Term Care Client Records - Developmentally Disabled	EVT + 7 years: EVT = Case Closed		W
Long Term Care Client Records (Except Developmentally Disabled)	EVT + 7 years: EVT = Case Closed		W
Mental Health AODA / Clinical Services			
Client Index Card Files	Permanent		N/A
Clinical Services Division Client Records	EVT + 7 years: EVT = Child turns 19 or case closed	DHS 92.12(1)-(4) and DHS 63.15	W
Community Support Program (CSP) Admissions, Referrals, and Discharge Logs	CR + 7 years	DHS 63.08	W
Community Support Program (CSP) and Day Treatment (DT) Client Review Notes for State Audit	CR + 7 years		W
Community Support Program (CSP) Client Review Log	Permanent		N/A
Community Support Program (CSP) Client Waiting Lists	S		N/A
Community Support Program (CSP) Statistics	CR + 3 years		W
Complaint Investigations	EVT + 7 years: EVT = After Settlement		W
Court Commitment Tracking Sheets	S		W
Day Treatment and Group Home Waiting Lists	S		W
Day Treatment Attendance Sheets	CR + 1 Month		W
Day Treatment Statistics	CR + 2 years	DHS 105.324	W
Disease Indexing	Permanent		N/A
Employee Blood Born Pathogen Records	EVT + 30 years: EVT = Terminated		W
Employee Training Log	CR + 6		W

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Records Series Title	Retention Period	Authority	WHS
Employee Training Records (OSHA)	CR + 3 years	CPL 2-244D	W
Hospital Census Sheets / Demographic	CR + 10 years		W
In-Patient Database Cards	Permanent	DHS 63.16	N/A
Medical Staff Credential Files With Disciplinary Action	Permanent		N/A
Medical Staff Credential Files Without Disciplinary Action	EVT + 7 years: EVT = Termination		W
Nursing Schedules	CR + 5 years		W
OBRA Screening (Omnibus Budget Reconciliation Act)	CR + 1 year		W
Patient Treatment Survey	EVT + 1 year: EVT = Survey Complete		W
Payee Client Files	CR + 2 years		W
Payee Financial and Billing Records	CR + 2 years		W
Petty Cash Vouchers	S		W
Physician's Registry	Permanent		N/A
Quality Assurance	EVT + 1 year: EVT = Survey Complete		W
Supervision Log	CR + 3 years		W
Survey's - Title XIX	CR + 15 years		N/A

1-12-11-M: Land & Water Conservation

Administration			
Annual Work Plans	CR + 5 years		W
Citation & Park Patrol Records	CR + 2 years		W
Construction Contracts	CR + 7 years		W
County Forest Plan	CR + 15 years	§28.11	N
Credit Card Receipts	CR + 1 year		W
DNR Agreements	CR + 7 years		W
Employee Emergency Informational Form	S		W
Equipment & Vehicle Registration Reports	EVT: EVT = Equipment / Vehicle disposed of		W
Expenditures, seasonal employees	CR + 3 years		W
General Information	S		W
Guidebooks & Trail Information	S		W
Lawsuits	EVT + 1 year: EVT = Final Disposition		W
Licensed Establishment Collection Reports	CR + 5 years		W
Material Recycling Facility (MRF) Financial Records	CR + 3 years		W
Plat Books	Permanent		N/A
Radon Reimbursement Requests	CR + 7 years		W
Records of Bounty Claims Forwarded to DNR	CR + 1 year	§59.52(4)(a)3.	W

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Records Series Title	Retention Period	Authority	WHS
Street Atlas	Permanent		N/A
Study, departmental fee rates	CR + 3 years		W
Timber Sale Contracts (bid openings, etc.)	CR + 7 years		W
Wisconsin Conservation Corps Projects / Crew Information	CR + 3 years		W
Environmental Health			
Establishments Out of Business, Dept. of Agriculture	Permanent		N/A
Fluoride Nitrate Test Results	CR + 5 years		W
Food Sample Reimbursement Documentation	CR + 7 years		W
Lab Water Testing Log	S		W
Nitrate Analysis Reports (ISE)	Permanent		N/A
Storage Tank Compliance & Maintenance Manual	S		W
Storage Tank Installation & Removal	Permanent		N/A
Storage Tank Registration & Permit Records	CR + 7 years		W
Storage Tank Remediation Financial Records	CR + 7 years		W
Storage Tank Remediation	Permanent		N/A
Storage Tank Remediation & Site Assessment Negatives	Permanent		W
Water Sampling Summary Reports	EVT + 5 years: EVT = Audit		W
Well Inspection Lab Note Log	CR + 5 years		W
Well Inspection Logs	Permanent		N/A
Well Surveys	CR + 5 years		W
Land Resources			
Agriculture Compliance Inventory & Data Base	Permanent		N/A
Agriculture Land Preservation Plan	S		N
Cost Sharing Agreement Records	EVT + 3 years: EVT = Termination or Expiration of all contracts signed that year	NR 120 and ATCP 50	W
County Mining and Yard Waste Contracts	Permanent		N/A
Detailed Design Drawings (Land & Water Conservation Designs)	Permanent		N/A
Drainage District Files	Permanent		N/A
Erosion and Storm Water Permits	Permanent		N/A
Farm Conservation Plans	Permanent	120-GM, 408-98, SCS/CRS (29)(31)(a)	N/A
Farmland Preservation Certifications	CR + 7 years		W
Interdepartmental Agreements	S		W
Land and Water Resource Management Plan (LWRM)	Permanent		N
Land Conservation Grants	CR + 7 years		W

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Records Series Title	Retention Period	Authority	WHS
Wetland Maps	Permanent		N/A

1-12-11-N: Landfill

Computer Recycling Reports	Permanent		N/A
County Compost Facility Reports	Permanent		N/A
County Landfill Agreements	S		W
Feasibility Studies	Permanent		N/A
Hazardous Waste Collection Grant Program Files	CR + 5 years		W
Hazardous Waste Surveys	CR + 3 years	NR 544.07	W
Household Hazardous Waste (Clean Sweep)	Permanent	NR 187	N/A
Materials Recycling Facility Monthly Reports	EVT + 3 years: EVT = Superseded		W
Recycling Grants	EVT + 7 years: EVT = Audited		W
Recycling Newsletter	CR + 10 years		W
Service Agreement (MRF)	EVT + 7 years: EVT = Termination		W
Solid Waste Management Plan	Permanent		N/A

1-12-11-O: Maintenance, Buildings and Grounds

Access Control List (e.g., Key, Swipe Card, Key Fob, and/or Access Code)	P/S		W
Buildings, Facilities & Grounds Data	S		W
Construction Project Planning, Proposal, & Administration Records	7 years after project completion		W
Construction Submittals (e.g., Shop Drawings, Samples, & Product Data)	P		N/A
Environmental Health & Safety Records	CR + 7 years		W
Equipment, Systems, & Vehicles (e.g., Purchase Information, Instruction Manuals, Maintenance Agreements, Maintenance Logs, Warranties)	Life of Equipment, System, or Vehicle		W
Incident Reports	CR + 3 years		W
Facilities Management			
Asbestos Files	Permanent	29 CFR 1910.20	N/A
Cleaning Log	CR + 1 year		W
Condemned Homes on County Property / Burning of	Permanent		N/A
County Building Files	EVT + 3 years: EVT = Superseded		W
Flood File (Administration Center)	Permanent		N/A
Inspection Cleaning Evaluation Reports	CR + 2 years		W

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Records Series Title	Retention Period	Authority	WHS
Inspection Reports (Elevator, etc.)	CR + 7 years		W
Key Number Listing	Permanent		N/A
Maintenance Job Order Data Sheet	CR + 1 year		W
Maintenance Key Daily Sign Out Sheet	S		W
Maps - Original Drawings	Permanent		N/A
Natural Gas Usage Manual	S		W
Parks, substations & highway building survey reports / yearly	CR + 10 years		W
Payroll Time Cards (Maintenance)	CR + 7 years		W
Project Files	Permanent		N/A
Project Log	Permanent		N/A
Record of Transmittal	CR + 3 years		W
Utility Computer Printouts	S		W

1-12-11-P: Public Works

Contracts			
Affidavit of organization & authority, successful bidders	EVT + 7 years: EVT = Project completion		W
Affidavit of organization & authority, unsuccessful bidders	CR + 2 years		W
Bid Tabulations	EVT + 7 years: EVT = Project completion		W
Bidder's Proof of Responsibility, successful bidders	CR + 7 years		W
Bidder's Proof of Responsibility, unsuccessful bidders	CR + 2 years		W
Bids, successful	EVT + 7 years: EVT = Project completion		W
Bids, unsuccessful	CR + 2 years		W
Notice to Contractors, successful bidders	CR + 7 years		W
Notice to Contractors, unsuccessful bidders	CR + 2 years		W
Performance Bond	EVT + 7 years: EVT = Project completion		W

1-12-11-Q: Register of Deeds

Non-permanent			
Accounts payable	CR +7 years		W
Accounts receivable	CR + 7 years		W
Accounts receivable, paid	CR + 2 years		W
Airport protection plans, specifications, and amendments	CR + 7 years	§114.135	W

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Records Series Title	Retention Period	Authority	WHS
Any records subject to litigation, claim, audit or other action	Until permission to destroy obtained from Corporation Counsel		W
Applications for certified copies	CR + 2 years		W
As-built tracings	Life of project		W
Bills of sale	CR + 6 years		W
Blueprints	Until superseded by as-built tracings		N
Breeding service: claim and payment for	CR + 7 years § 779.49 (1)		W
Cancelled checks	CR + 7 years § 59.54(16)		W
Cash register tapes	CR + 2 years		W
Certificates of old age assistance and indexes	CR + 7 years		N
City record of officers and employees' surety bonds	CR + 7 years	§66.145	W
City/Village: Reorganization of city as village, election returns on question of	CR + 7 years § 66.019 (6)		W
City/village: lease of space by	CR + 7 years	§66.048 (3)(c)	W
Correspondence	CR + 3 years		W
Equipment & furnishings inventories	Until superseded		W
General information	CR + 7 years		N
Guardian, petition for appointment of	CR + 7 years	§880.215	W
Indigent defendants: certificate of legal fees paid by county or state	CR + 7 years	§757.66	W
Insurance policies, claims made	7 years after expiration	§59.52(10)	W
Insurance policies, occupancy	CR + 7 years	§59.52(10)	W
Liquidated insurers' records	7 years after close of liquidation proceedings § 645		W
Municipal redevelopment plan and revisions	CR + 7 years § 66.431 (9)(a)1, 66.431 (11)(b)		N
Notice of removal of human corpse	2 months from date of death; Dept. H&SS directive		W
Notification of failure to pay taxes and notification of balances due (veterans)	CR + 7 years	§45.53	W
Order to suspend proceedings for collection of property taxes of property owned by veterans	CR + 7 years	§45.53 (6)	W
Purchase orders	CR + 7 years		W
Raze order	CR + 7 years	§66.05 (1)(d)	W
Receipt journals	CR + 7 years		W
Receipts	CR + 7 years		W
Report for final disposition of corpse	2 years from date of death; Dept. H&SS directive		W

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Records Series Title	Retention Period	Authority	WHS
Treasurers receipts	CR + 2 years		W
UCC filings (Fixture)	EVT = satisfaction of mortgage	§§ 409.403(6) and 409.402(5)	W
UCC filings (Non-fixture)	CR + 5 years	§409.403(3)	W
UCC - 11, search copies	CR + 2 years		W
Vital record, request for copy of	FIS + 1 year		W
Vouchers order/register	CR + 7 years		W
Wills, foreign: certificate of assignment	CR + 7 years	§868.05(2)	W
Wills, notice that proceedings have been taken to contest the will	CR + 7 years	§868.01(3)	W
Permanent			
Annexation of territory by a city or village: related records	Permanent	§§66.021(8)(a) (e) and 66.023 (10)	
Annulment, divorce or legal separation judgment which affects title to real estate or liability for payment of support or maintenance	Permanent	§§767.255, 767.40(2)	
Appointment of any guardian or conservator appointed in any other state, district, territory or country together with a duly authenticated copy of the appointment of the special guardian of such minor or incompetent person	Permanent	§786.25(3)	
Armed forces: registration of all county persons who died in the services of the U.§ armed forces	Permanent	§45.35(a)	
Articles of incorporation and amendments for mutual associations	Permanent	§215.71(3)	
Articles of incorporation for capital stock associations and amendments	Permanent	§215.61(3)	
Articles of incorporation for banking corporation and amendments	Permanent	§221.03(3)	
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	Permanent	§891.20	
Assessors' plats and amendments	Permanent	§70.27(2), (8)	
Authorization to execute conveyances on behalf of a private corporation	Permanent	§706.03(3)	
Bulkhead line, establishment of or reestablishment of an existing bulkhead line along shore of navigable waters: map, description and ordinance	Permanent	§30.11(3)	
Business partnership agreements, amendments, articles of dissolution	Permanent	§178.39	

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Records Series Title	Retention Period	Authority	WHS
Cemetery association (non-profit) certification resolutions and copy of proceedings	Permanent	§157.062(9)	
Cemetery plat or map, records: order authorizing the vacating or replatting of the lands, record of a cataloged burial site	Permanent	§§157.07(1), 157.07(5) and 157.70(2)(i)	
Census schedules	Permanent		
Certificate of authorization to exercise fiduciary powers	Permanent	§221.04(6)	
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	Permanent	§215.58(3)	
Certificate reorganizing a mutual association as a mutual savings and loan holding company	Permanent	§ 215.59(1)(g)	
Certificates of conversion from a mutual savings bank to a stock savings bank	Permanent	§214.685(5)	
Certified survey map and corrections of	Permanent	§§236.34(1), and 236.295(1)	
Chattel mortgages	Permanent		
City condemnation and acquisition of property by cities, including report and plan of improvement, common council resolutions related to property	Permanent	§§32.55(3), 32.56(2), 32.57 (7)(b)	
City: certificate showing that a city has established an official map	Permanent	§62.23(6)(b)	
Condominium instruments: declaration, plats, and plans of a condominium and attached exhibits or schedules	Permanent	§703.07(1)	
Contracts: credit sale of alcoholic dispensing equipment, share croppers	Permanent	§§125(33)(2)(e) and 241.03(1)	
Conveyance and instrument affecting title to land in this state and index	Permanent	§706.05(1), (7)	
Cooperatives: incorporation articles; contract between cooperative association and members terminations; weekly listing of all documents concerning cooperatives filed and recorded by secretary of state	Permanent	§§185.05(3), 185.42(1), (2), (5) and 185.82 (3)	
Corporate name: record of those using name, amendments, discontinuance	Permanent	§134.17(1)	
Corporations (miscellaneous non-profit): fraternal societies, VFW posts and affiliates	Permanent	§§188.06 and 188.11(1)	
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	Permanent	§§181.32(1), 181.45(2) and 181.67(3)(a)	
Corporations (religious): certificate of establishment; certificate of consolidation; incorporation articles and amendments; dissolution of corporation	Permanent	§§187.01(2), 187.14(4)(c), 187.16(1) and 187.19(10)	

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Records Series Title	Retention Period	Authority	WHS
Corporations: resolution dissolving domestic corporation	Permanent	§182.025(2)	
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 canceling a Credit Union's charter	Permanent	§§ 186.35(1), 186.02(3)(a), 186.38(2) and 186.315	
Daily report regarding system of tract indices or system of chain of title indices as required by county board of supervisors resolution	Permanent	§59.43(12m)(c)	
Declaration of trust for domestic and alien corporations and amendments	Permanent	§226.14(1)	
Deed: certificate of cancelled deed	Permanent	§75.23	
Descent of property, judgment to determine	Permanent	§867.05(4)	
Discharge certificate from U.§ armed forces	Permanent	§45.21	
Drainage district, orders of organization, assessment for costs on drainage lands, order laying out drain	Permanent	§§ 88.34(9), 88.40 and 88.94(5)	
Estate transfer by will, intestacy or appointment, disclaimer of	Permanent	§853.40(5)(e)	
Estates: Order settling small estates including those subject to claims of creditors	Permanent	§§867.01(3)(h) and 867.02(2)(h)	
Estates: statement terminating joint tenancy of life estate	Permanent	§§867.04 and 865.20(2)	
Execution and sale of real estate, certificate of	Permanent	§§815.38(1) and 59.43(11)	
Exploration mining lease; and cancellation of	Permanent	§§107.20(1) and 107.25(2)	
Farmland preservation agreement and relinquishment	Permanent	§§91.13(9) and 91.19(5)	
Farms or country estates, registration of names	Permanent	§59.76(1)	
Federal tax liens and certificates and notices affecting the liens and indexes	Permanent	§779.97(2)(b)	
Forest croplands, order of entry, transfer, withdrawal	Permanent	§§77.02(3) and 77.10(2)(a)2.	
Forest land (managed): Orders regarding	Permanent	§§77.82(8) and 77.91(5)	
Forest lands (county): order of entry, withdrawals	Permanent	§28.11(4)(d), (11)(a)	
Grantor/grantee index -- index to real property records	Permanent	§59.43(9)	
Highway (controlled access): finding, determination and declaration designating a highway or controlled-access highway; notice of any vacation of a controlled-access highway	Permanent	§§ 53.027(1), 84.25, 83.027(13) and 84.25(13)	
Highway assessments and apportionment on lands for county parks and parkways	Permanent	§27.065(13)(c)	

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Records Series Title	Retention Period	Authority	WHS
Highway or street maps: map of proposed street or highway for purpose of widening, notice and map for right-of-way, alterations, etc.	Permanent	§§80.64 and 84.295(10)(a)	
Highway register: county	Permanent	§83.01(7)(g)	
Ice age trail areas: articles of dedication, amendments, revisions, withdrawal of articles	Permanent	§§ 23.293(15) (f) and 23.293 (15), (17)(e)	
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	Permanent	§228.05	
Index of records or files kept in the register's office	Permanent	§59.43(10)	
Industrial development agencies: articles of incorporation	Permanent	§59.57(2)(e)(2)	
Inland lake protection and rehabilitation district, document authorizing creation of	Permanent	§33.265	
Interest in property, statement or certificate confirming	Permanent	§§865.201(2) and 867.046 (1)(m)	
Judgment of declaration of interests in real property	Permanent	§841.10(1)	
Land patents, U.S.	Permanent		
Levy or writ of execution on real property	Permanent	§815.195	
Lien for threshing, husking, baling	Permanent	§779.50(3)	
Lien judgment	Permanent	§75.521(14)	
Lien or mortgage, discharge order	Permanent	§847.09	
Lien: certificate of redemption of judgment lien on loan	Permanent	§851.64	
Liquidated insurer, documents relating to property of	Permanent	§645.46(17)	
Lis pendens	Permanent	§ 840.10(1) and 59.43(11)	
Marital property agreements and related statements	Permanent	Ch. 766	
Metro sewage district boundary: resolution to redefine	Permanent	§66.888(1)(c)4.b & (1)(d)3	
Mineral interests: statement of claim	Permanent	§706.057(4)	
Mineral rights register consisting of conveyances of mineral interests	Permanent	§706.055	
Monuments: survey conducted to erect monuments	Permanent	§60.84(4)	
Mortgage liens upon public utilities and satisfaction of mortgage lien	Permanent	§66.066(2)(b)	
Mortgage: certificate of discharge after foreclosure	Permanent	§846.13	
Mortgage title: evidence of right of creditor to acquire	Permanent	§815.53(4)	

Ordinance 14-0901*Revised Records Retention Schedule*

Records Series Title	Retention Period	Authority	WHS
Name change: certified copy of order and indexes	Permanent	§786.36	
Natural areas heritage program: articles of dedication, amendments, withdrawals	Permanent	§23.29(16), (18)(f), (20)(e)	
Oaths of office	Permanent	§19.01(4)(d)	
Plat maps and corrections of	Permanent	§§ 236.02(10) and 236.295(1)	
Plat maps: notification to authorities to approve or permitted to object to the final plat that has been recorded	Permanent	§236.26	
Plat maps: resolution of municipality to waive its right to approve plats and resolution to rescind waiver	Permanent	§236.10(5)	
Power of attorney	Permanent	§813.23(1)(b)	
Probate judgment assigning an interest in real property upon closure of estate	Permanent	§863.29(1)	
Proof of age (duplicate or certified copy)	Permanent	§ 889.28	
Public land: notice of pending application to lay out, widen, or vacate a public place	Permanent	§840.11(1)	
Public lands: abstract and records of all proceedings 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	Permanent	§59.71	
Public lands: annulment of certificates and patents	Permanent	§24.35	
Rail property: release of first right to acquire by DOT	Permanent	§85.09(5)(b)	
Railroads: map showing proposed route	Permanent	§ 190.10(1)	
Railroads: surveyed map and certificate of the alteration or change of routes	Permanent	§191.20	
Real estate liens: payment affidavit for prior liens	Permanent	§779.98(3)	
Real estate owners subject to building codes	Permanent	§62.17(1)	
Real estate transfers	Permanent	§77.29	
Real estate: order confirming the sale of real estate of wards or incompetents	Permanent	§786.07	
Real property: affidavit of publication of a sale	Permanent	§985.12(3)	
Release of power of appointment over legal or equitable interests in real or personal property	Permanent	§702.09(3)(d)	
Rental units: certificates, waivers, stipulations relating to	Permanent	§101.122(6)	
Retrocession of jurisdiction, documents concerning	Permanent	§1.031	
Savings bank: articles of incorporation of a savings bank and amendments	Permanent	§214.25(5)	

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Records Series Title	Retention Period	Authority	WHS
School district: resolution by two or more school districts to establish an alternative method of governing assets and liabilities	Permanent	§66.03(2c)(b)	
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	Permanent	§§ 409.401 (1)(a), 409.402 (1)(b), (9) and 59.43(1)(n)	
Security interest upon certificate of title of motor vehicles and boats, memoranda regarding	Permanent	§§ 30.572(4)(5) and 342.20(3)	
Security interests: financing statements, amendments, termination statements, continuation statements, statements of assignment and statements of release	Permanent	§§409.404 (1)(a), 409.405 (2), 409.410(1)	
Sewer and transportation facilities, record of damage awards by condemnor	Permanent	§32.05(7)(c)	
Share croppers' contracts	Permanent	§241.03(1)	
Solar access rights: notice granting permit, notice terminating rights, waiver of rights by permit holder	Permanent	§§66.032(6)(b), (9)(c) and (10)	
Solid waste disposal facility or a hazardous waste facility: notation of the existence of	Permanent	§§ 144.44(4)(b) and 59.43(1)(q)	
Surety company bond	Permanent	§344.36(2)	
Surplus state-owned real property, agreement of transfer	Permanent	§16.375(4)	
Surveyor's records, field notes	Permanent		
Time-share instrument and amendments; termination agreement	Permanent	§§707.21(3) and 707.24(2)(b)	
Town boundary or name change: order or ordinance	Permanent	§§59.17(12) and 59.23(2)(k)	
Town mutual corporate documents	Permanent	§612.81 and 59.43(12)(b)	
Town sanitary districts: order of establishment referendum and resolutions to consolidate districts	Permanent	§§60.71(7) and 60.785(2)(a)	
Towns: record of non-compliance with zoning ordinance	Permanent	§60.61(5)b	
Tract index	Permanent	§59.43(12m)(a)	
Trademarks, labels, badges, statement or description of	Permanent	§132.04	
Trusts: disclaimer of real property or an interest in real property	Permanent	§701.27(5)(e)	
Trusts: letters of trust for a foreign trustee (named in a will)	Permanent	§701.16(1)(d)	
Village: petition for dissolution of a village and election results on question of	Permanent	§61.187(2)	
Village records: Papers, documents and orders relating to the organization and incorporation or the alteration of the boundaries of any village	Permanent	§891.10	

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Records Series Title	Retention Period	Authority	WHS
Vital records: certificate of birth, death, divorce or annulment, marriage documents & related data plus indexes	Permanent	§§69.01(15)(a) and 59.43(1)(h)	
Woodland tax lands: entry, declassification of; tax law classification	Permanent	§77.16 (3), (7), (9)	
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	Permanent	§§59.43(11), 811.11, 811.17 and 811.22	

1-12-11-R: Sheriff

Process / Identification Bureau			
Attorney Letters	CR + 7 years		W
Bureau of Identification Sheets	Permanent		N/A
Civil Process Worksheet	CR + 1 year		W
Correspondence Instructing Civil Process, service	CR + 7 years		W
Daily Roster Assignments	CR + 1 year		W
Death Investigation Negatives, Sensitive in Nature	Permanent		N/A
Department Employee Photos	EVT + 7 years: EVT = Termination		W
Evidence, Major Cases	EVT + 1 year: EVT = Final Appeal		W
Execution Log	CR + 7 years		W
Executions	CR + 7 years		W
Finger Print Cards	Permanent		N/A
Foreclosure's, Sheriff's Sales	EVT + 7 years: EVT = Sale of Property		W
Form 50's	CR + 7 years		W
Injunctions	EVT: EVT = After Expiration		W
Mug Shots	Permanent		N/A
Process, deposit receipts	CR + 7 years		W
Process, receipt print-outs	CR + 7 years		W
Proof of Service	CR + 7 years		W
Property Inventory Audit	EVT + 20 years: EVT = Disposition of property		W
Restraining Orders	EVT: EVT = Closed		W
Traffic Accident Photos	EVT + 6 years: EVT = Date of final Appeal		W
Transport Records	CR + 7 years		W

Ordinance 14-0901*Revised Records Retention Schedule*

Records Series Title	Retention Period	Authority	WHS
Jail Division			
Account work sheets	CR + 7 years		W
Applicant Status Sheets (non-hire)	EVT + 1 year: EVT = Interview		W
Block Check Sheets	CR + 8 years	§59.27(8)	W
Bond Receipts	CR + 8 years	§59.27(8)	W
Booking Sheets	Permanent		N/A
Canteen sheets	CR + 7 years		W
Cash Books	CR + 8 years		W
Check Books	CR + 7 years		W
Contract Employee Files	EVT + 5 years: EVT = Termination		W
Critical Incidents	EVT + 8 years: EVT = Incident		W
Daily Attendance Rosters	CR + 8 years		W
Daily Bond	CR + 8 years	§59.27(8)	W
Daily Work Shift Roster	CR + 8 years	§59.27(8)	W
Dockets, daily jail records	CR + 8 years	§59.27(8)	N
Exercise Logs	CR + 8 years	§59.27(8)	W
Fire Equipment & Inspection Report	CR + 8 years		W
Huber Block Check Sheets	CR + 8 years		W
Huber Daily Inmate Roster	EVT + 8 years: EVT = Release of Inmate	DOC 348.09(1)	W
Huber Inmate Incarceration Files	EVT + 8 years: EVT = Release of Inmate		W
Huber Registration of Visitors	CR + 8 years	DOC 348.09(4)	W
Huber Rules Forms	CR + 8 years	§59.27(8)	W
Inmate Daily Activity Log Forms	CR + 8 years	§59.27(8)	W
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 and 350.11	W
Inmate Medical Records	EVT + 8 years: EVT = Release of Inmate	§§146.81 to 146.83, DOC 348.09 and DOC 350.11	W
Jail billing	CR + 8 years	§59.27(8)	W
Jail Inmate Register	S	DOC 350.11	W
Jail Kitchen Menu	CR + 1 Month		W
Jailer logs	CR + 8 years	§59.27(8)	W
Law Suits & Complaints	EVT + 5 years: EVT = Settlement or Closure		W
Ledger Sheets	CR + 7 years		W
Monthly Equipment Check	CR + 8 years		W
Shift Logs	CR + 8 years		W

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Records Series Title	Retention Period	Authority	WHS
Surveillance Recordings-Audio/Video	121 days	§893.80	W
Visitor Log	EVT + 8 years: EVT = Date of Visit	DOC 350.11	W
Volunteer Security	CR + 5 years		W
Detective Division			
Arrest Records	CR + 8 years	§59.27(8)	W
Citizen Complaints	Permanent		N/A
Evidence Cards	CR + 10 years	§59.27(8)	W
Field Interrogation Cards	EVT + 8 years: EVT = Close of Case		W
Incident Records	CR + 10 years	§59.27(8)	W
Internal Investigation Files	EVT + 1 year: EVT = Death of person unless there is open activity on the case		W
Juvenile Cards	EVT + 1 year: EVT = Juvenile's 18th Birthday		W
Ordinance Violation Citation	CR + 2 years		W
Polygraph Examinations and Reports	Permanent		N/A
Patrol Division			
False Alarm Card File	S		W
False Alarm Door Opening Invoices	CR + 1 year		W
Fleet Maintenance Records	Life of Vehicle		W
Intern Records	CR + 5 years		W
School Surveys	CR + 5 years		W
Squad Car Video Recordings	CR + 121 Days	§893.80	W
Uniform Traffic Citations	EVT + 1 year: EVT = Closed, disposed, or canceled		W
Wisconsin Accident Reports	CR + 8 years		W
Work Schedules	CR + 7 years	§59.27(8)	W
Dispatch Center			
Audio Tapes (e.g., 911)	CR + 121 days	§893.80	W
Incident Record	CR + 10 years		W
Telecommunicator's Radio	CR + 120 days		W
Records			
Accident Report	CR + 8 years		W
Accident Reports, Non-Reportable	CR + 8 years		W
Alcohol Assessments Education Referrals	CR + 5 years		W
Blueprints, Justice Department	Permanent		N/A
Citations	CR + 8 years		W
Contract Municipality Logs	S		W
Driver Condition Behavior Reports	CR + 2 years		W

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Records Series Title	Retention Period	Authority	WHS
Ignition Interlock Device Installation & Removal Record	S		W
Incident Reports	Permanent		N/A
Laser Logs	EVT + 8 years: EVT = End of use		W
Money Transfer Log, Front Desk	CR + 2 years		W
Orders to Produce (Writs)	S		W
Patrol Roster	CR + 2 years		W
Radar Certification Logs	EVT + 8 years: EVT = End of use		W
State Uniform Crime Report	CR + 5 years		W
Warning Notices	EVT + 6 Months: EVT = After compliance		W
Drug Unit			
Asset Forfeiture Log	Permanent		N/A
Asset Forfeitures	EVT + 8 years: EVT = Given up for Auction		W
Confidential Informant File	Permanent		N/A
Confidential Informant Log	Permanent		N/A
Evidence Destruction File	EVT + 8 years: EVT = Last date of Appeal		W
Fleet Leased Contracts	EVT + 1 year: EVT = Contract termination		W
Incident Report Log	EVT + 8 years: EVT = Date of Last Incident		W
Incident Reports	Permanent		N/A
Intelligence Request Log	CR + 15 years		W
Known Offender File (KOF) Lawsuits	EVT + 7 years: EVT = Date of last appeal		W
Officer's Daily Reports	CR + 7 years		W
Petty Cash Vouchers	EVT + 7 years: EVT = Audited		W
Search Warrants	EVT + 1 year: EVT = Search Completed		W
Warrant, Sex offence & Drug Activity Log Book	Permanent		N/A
Court Services / Warrants			
Bailiff Time and Activity Report	CR +3 years		W
Court Security Reports	CR +3 years		W
Daily Employee Witness Court Record	S		W
Stun Belt in Custody Notification & Maintenance Log	EVT + 8 years: EVT = Date of Final Appeal		W
Warrant Cards	EVT + 1 year: EVT = Warrant Cancellation		W
Warrant, cancellation sheet from court	EVT + 7 years: EVT = Warrant Cancellation		W

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Records Series Title	Retention Period	Authority	WHS
Warrant, ledgers	EVT + 7 years: EVT = Warrant Cancellation		W
Warrant, problems and complaints	CR + 7 years		W
Warrants	EVT: EVT = Until Satisfied		W
Warrants, cancelled - gold sheet	EVT + 1 Month: EVT = Cancellation or Served		W
Warrants, cancelled extradition	EVT + 3 years: EVT = Warrant Cancellation		W
Administration			
Accidents, squad	EVT + 8 years: EVT = Closed		W
Contract Logs	CR + 1 year		W
Conveyance Cards	EVT + 3 years		W
Daily Roll Call Rosters	CR + 8 years		W
Department General Orders	Permanent		N/A
Emergency Personnel Employee Records	S		W
False Alarm Fee Documentation, uncollectible	CR + 3 years		W
Grant Reports and Documentation	EVT + 3 years: EVT = Last Payment Received		W
Overtime Cards	CR + 7 years		W
Psychological Evaluations (Employee)	EVT + 15 years: EVT = Termination		W
Warrants, teletypes / municipalities	EVT: EVT = Warrant Cancellation		W

1-12-11-S: University Extension

4-H, Award/Convention Materials	CR + 50 years		W
4-H, Enrollments	CR + 25 years		W
4-H, Health Records - Summer Camp	EVT + 3 years: Child turns 21 years of age		W
Garden Plot Rentals	CR + 3 years		W
Homemaker Program, Agencies / Groups	CR + 7 years		N
Homemaker Program, Participants	CR + 7 years		W
Monthly Reports, UPS, Copies, Postage	CR + 1 year		W
News Releases	CR + 2 years		W
Newsletters, Originals	CR + 25 years		W
Premium Books, County Fair	CR + 1 year		N
Program / Teaching Curriculum	S		N
Project Files	S		W
Shipping Books, UPS	CR + 1 year		W
Soil Sample Reports	CR + 2 years		W
Soil Test Receipts, Invoices	CR + 3 years		W

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Records Series Title	Retention Period	Authority	WHS
Volunteer Certification, VOLT, Program (Volunteer Orientation Leadership Training)	Permanent		W

1-12-11-T: Veterans Service

Cemetery List	S		W
Commemorative Event Information	CR + 10 years		W
Grave Registration Files	Permanent		N
Mailing Log, Daily In/Out	CR + 1 year		W
Military Separation Records of Veteran's	Permanent		N/A
Monthly Forms Tally Sheet	CR + 2 years		W
Newsletter	CR + 6 years		**
**Send a copy to Librarian: WI Veterans Museum, 30 W. Mifflin St., Madison, WI 53703			
News Releases	CR + 6 years		W
Office Critiques	CR + 2 years		W
Regulations	S		W
Veteran's Benefit Case Files	EVT + 2 years		W
Veterans burials and record of financial assistance	CR + 7 years	§45.17	W
Veterans' Information Management System (VIMS) Backup Disks	S		W
Veterans' Personnel Cards	Permanent		N/A
Veterans' Personnel Records	Permanent		N/A
Veterans' Personnel Records, Agent Orange	Permanent		N/A
Veterans' Personnel Records, Desert Storm	Permanent		N/A
Veterans' Relief Records	CR + 10 years		W
Wisconsin Department of Veterans' Affairs Bulletins	Permanent		N/A

1-12-11-U: Zoning

Amendments to the County Development Schedule	Permanent		N/A
Atlas	S		N
Board of Adjustment Case Files	Permanent		N/A
Board of Adjustment Decisions & Supporting Documentation	Permanent		N/A
Building Plans	Life of Project		W
Conditional Use Files	Permanent		N/A
Drainage District Records	Permanent		N/A
Flood Hazard Inquiries, Determinations	Permanent		N/A
Inspection Reports for Sanitary	Permanent		N/A
Land Use Permits, easements	Permanent		N/A
Log, board of adjustment cases	Permanent		N/A

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Records Series Title	Retention Period	Authority	WHS
Log, violations	Permanent		N/A
Permit Applications	Permanent		N/A
Permit Records	Permanent		N/A
Plan of Operations and Site Plans	Permanent		N/A
Project, Redistricting, Reapportionment	EVT + 10 years: EVT = Next Report Received or Project Completed		W
Receipt Books	CR + 7 years		W
Rezoning Files, zoning amendments	Permanent		N/A
Subdivision Records	Permanent		N/A
Town Plan Commission Reviews, community assistance	Permanent		N/A
Video Tapes	CR + 3 years		W
Violation Complaint	Permanent		N/A
Violation Files	Permanent		N/A
Wetland & Flood Plain Preservation Maps	Permanent		N/A
Zoning Applications, rejected and no activity	Permanent		N/A
Zoning Committee Records	Permanent		N/A
Zoning Map	Permanent		N/A
Zoning Ordinances	Permanent		N/A
Zoning Permits Issued	Permanent		N/A
Environmental Health			
Delinquent Septic Systems	S		W
Holding Tank Files	CR + 3 years		W
Holding Tank Maintenance Cards	CR + 2 years		W
Non-Metallic Mining Permit Files	Permanent		N/A
Private Sewage System Inspection Reports	Permanent		N/A
Property Site Inspections	CR + 10 years		W
Public Camp Grounds	CR + 3 years	DHS 192.01 and 192.08 (1)	W
Reimbursement Reports	CR + 1 year	DHS 192.01 and 192.08 (1)	W
Septic Permits	Permanent		N/A
Septic System Inspection Files	Permanent		N/A
Sewage Complaints	Permanent		N/A
Soil Test Reports	EVT: EVT = Land developed and permit issued		W
Wisconsin Fund Grant Program Files	CR + 7 years		W