

**RESOLUTION NO. 2016-\_\_**

**Requesting the State of Wisconsin to sustainably fund Wisconsin's transportation system**

Executive Summary

The State of Wisconsin highway and interstate system is the backbone of the surface transportation system and plays a vital role in the economy of Wisconsin. According to "*Filling Potholes: A New Look at Funding Local Transportation in Wisconsin*," commissioned by the Local Government Institute of Wisconsin (LGI), the condition of Wisconsin's highways is now in the bottom third of the country. The Transportation Finance and Policy Commission, appointed by the Governor and Legislature, clearly found that if Wisconsin does not adjust its user fees, the condition of both the state and local roads will deteriorate significantly over the next decade. Highway paving and construction costs have increased significantly over inflation in the last decade. The average project cost increases in Jefferson County have more than doubled between 2004 and 2015. County Highway Resurfacing increased from \$125,000/mile to \$300,000/mile; County Highway Rehabilitation increased from \$250,000/mile to \$500,000/mile; and County Highway Reconstruction increased from \$400,000/mile to \$900,000/mile. These increases include costs associated with improved standards for highway construction. Additional state funding for Jefferson County will support the local economy through long-term construction improvements to Interstate 94 and to other important state highways including US Highway 18. This resolution requests the Governor and Legislature to agree upon a sustainable solution that includes a responsible level of bonding and adjusts user fees to adequately and sustainably fund Wisconsin's transportation system

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WHEREAS, the Executive Summary is hereby incorporated by reference into this resolution, and

WHEREAS, local government in Wisconsin is responsible for about 90% of the road miles in the state; and

WHEREAS, Wisconsin's diverse economy is dependent upon county and town roads as well as city and village streets and transit systems across the state, and

WHEREAS, according to "*Filling Potholes: A New Look at Funding Local Transportation in Wisconsin*," commissioned by the Local Government Institute of Wisconsin (LGI), the condition of Wisconsin's highways is now in the bottom third of the country, and

WHEREAS, state funding for local roads in Wisconsin has failed to keep up with costs over the past several decades which has adversely affected local transportation finances, and

WHEREAS, according to "*Filling Potholes*," municipal transportation spending has declined from \$275 per capita in 2000 to \$227 in 2012, and

WHEREAS, Mass Transit Operating Aids and County Elderly and Disabled Transportation assistance programs are funded through the state gas tax and vehicle registration user fee system which are critical to ensuring that transportation services are delivered to vulnerable citizens and funding for these programs helps ensure that all citizens have an opportunity to access the workplace as well as the marketplace, and

WHEREAS, levy limits do not allow local government to make up for the deterioration of state funding, and

WHEREAS, the state highway and interstate system is the backbone of the surface transportation system and plays a vital role in the economy of Wisconsin, and

WHEREAS, the Transportation Finance and Policy Commission, appointed by the Governor and Legislature clearly found that if Wisconsin does not adjust its user fees, the condition of both the state and local roads will deteriorate significantly over the next decade.

NOW, THEREFORE, BE IT RESOLVED by the Jefferson County Board of Supervisors requests the Governor and Legislature to agree upon a sustainable solution that includes a responsible level of bonding and adjusts user fees to adequately and sustainably fund Wisconsin's transportation system.

BE IT FURTHER RESOLVED that the County Clerk is directed to send a copy of this resolution to Governor Walker and the state legislators for Jefferson County and the Wisconsin Counties Association.

*Fiscal Note: This resolution will have no fiscal impact*

Ayes \_\_\_\_\_ Noes \_\_\_\_\_ Abstain \_\_\_\_\_ Absent \_\_\_\_\_ Vacant \_\_\_\_\_

Requested by Administration and Rules Committee

08-08-16

J. Blair Ward: 07-01-16

REVIEWED: Administrator: \_\_\_\_\_; Corp. Counsel: \_\_\_\_\_; Finance Director: \_\_\_\_\_

## Jefferson County Records Retention Schedule

**Department:** General Schedule

(including ~~R~~ records typically retained by the County Clerk and found throughout the County)

Revised: 10/11/2016/2008

| Record Title                         | State Code   | Authority    | Retention <u>Period</u><br>(Years <u>are in addition to</u><br><u>Plus-Current Year</u> ) | Official Copy |
|--------------------------------------|--------------|--------------|---|---------------|
| Agendas                              | W            |              | 1   | YES           |
| Agreements, Labor                    | W            |              | C   |               |
| <del>Agreement, Maintenance</del>    | <del>W</del> | <del>-</del> | <del>LOP</del>  | <del>-</del>  |
| Annual Reports, County               | W            |              | 3   |               |
| Annual Reports, Departmental         | W            |              | 3   |               |
| Artwork / Print Masters              | W            |              | S   | YES           |
| Associations, Professional Materials | W            |              | C   |               |
| Audit, Internal                      | W            |              | S   |               |
| Bank Deposits                        | W            |              | 7   | YES           |
| Bank Statements / Reconciliations    | W            |              | 7   |               |

|   |          |                          |             |            |
|---|----------|--------------------------|-------------|------------|
| <b>Benefit Bank Balance</b>                     | <b>W</b> |                          | <b>S</b>    |            |
| <b>Bids, Successful</b>                         | <b>W</b> | WI Stats 59.52(4)(a)(10) | <b>7</b>    | <b>YES</b> |
| <b>Bids, Unsuccessful</b>                       | <b>W</b> |                          | <b>1 AA</b> | <b>YES</b> |
| <b>Bids Pending Log</b>                         | <b>W</b> |                          | <b>1 M</b>  | <b>YES</b> |
| <b>Bids, Working Papers</b>                     | <b>W</b> |                          | <b>1</b>    | <b>YES</b> |
| <b>Billings, Department Backup</b>              | <b>W</b> |                          | <b>2</b>    |            |
| <b>Blank Forms</b>                              | <b>W</b> |                          | <b>S</b>    |            |
| <b>Blueprints / Drawings - County Facility</b>  | <b>W</b> |                          | <b>C</b>    |            |
| <b>Budget, Capital Projects</b>                 | <b>W</b> |                          | <b>2</b>    |            |
| <b>Budget, Departmental Operating</b>           | <b>W</b> |                          | <b>2</b>    |            |
| <b>Budget, Departmental Working Papers</b>      | <b>W</b> |                          | <b>2</b>    |            |
| <b>Budget, Jefferson County</b>                 | <b>W</b> |                          | <b>3</b>    |            |
| <b>Business Continuity Plan</b>                 | <b>W</b> |                          | <b>S</b>    |            |
| <b>Business Continuity Plan, Working Papers</b> | <b>W</b> |                          | <b>S</b>    | <b>YES</b> |

|  |          |                           |             |            |
|--|----------|---------------------------|-------------|------------|
| <b><u>By-Laws, County Board Committees, Boards, Commissions and Other Bodies</u></b> | <b>W</b> |                           | <b>S</b>    |            |
| <b>Calendars</b>   | <b>W</b> |                           | <b>C</b>    | <b>YES</b> |
| <b>Cash Register Tapes</b>   | <b>W</b> |                           | <b>7</b>    | <b>YES</b> |
| <b>Chart of Accounts Object Codes - Jefferson County</b>                             | <b>W</b> |                           | <b>S</b>    |            |
| <b>Checks, Cancelled / Voided</b>  | <b>W</b> | WI Stats 59.52(4)(a)(16)  | <b>7</b>    |            |
| <b>Check Copies</b>  | <b>W</b> |                           | <b>7</b>    |            |
| <b>Check Registers</b>   | <b>W</b> |                           | <b>7</b>    |            |
| <b>Code of Ethics - Jefferson County</b>   | <b>W</b> |                           | <b>S</b>    |            |
| <b>Computer Service Request Form (completed)</b>                                     | <b>W</b> |                           | <b>1</b>    |            |
| <b>Contracts / Agreements</b>  | <b>W</b> | WI Stats 59.52(4)(a) (10) | <b>7 AT</b> |            |
| <b>Correspondence, General</b>   | <b>W</b> |                           | <b>1</b>    |            |
| <b>Directory Information</b>   | <b>W</b> |                           | <b>S</b>    |            |
| <b>Employee Attendance Records</b>   | <b>W</b> |                           | <b>3</b>    | <b>YES</b> |
| <b>Fixed Assets</b>  | <b>W</b> |                           | <b>S</b>    |            |

|   |          |  |      |            |
|---|----------|--|------|------------|
| <b>General Receipts</b>                             | <b>W</b> |  | 1    |            |
| <b>Historical Records</b>                           | <b>N</b> |  | P    |            |
| <b>Indexes</b>                                      | <b>W</b> |  | C    |            |
| <b>Inventory, Equipment</b>                         | <b>W</b> |  | S    |            |
| <b>Invoices, Accounts Receivable</b>                | <b>W</b> |  | 3    | <b>YES</b> |
| <b>Invoices, Accounts Payable</b>                   | <b>W</b> |  | C    |            |
| <b>Leases</b>                                       | <b>W</b> |  | 7 AT |            |
| <b>Legal Opinions</b>                               | <b>W</b> |  | 10   |            |
| <b>Mailing Lists</b>                                | <b>W</b> |  | S    | <b>YES</b> |
| <b>Maintenance Agreements</b>                       | <b>W</b> |  | S    | <b>YES</b> |
| <b>Maintenance Service Request Form</b>             | <b>W</b> |  | C    |            |
| <b>Maintenance Service Request Form (Completed)</b> | <b>W</b> |  | 1    |            |
| <b>Manual Warrants</b>                              | <b>W</b> |  | 3    |            |
| <b>Manuals, Equipment</b>                           | <b>W</b> |  | LOP  |            |

|  |   |                         |     |     |
|--|---|-------------------------|-----|-----|
| Material Safety Data Sheets  | W | WI Stats 101.583 (1)(a) | 30  | YES |
| <del>Minutes – Commissions and Boards</del>  | W | -                       | 7   | -   |
| Minutes, <u>County Board</u> Committees, <u>Boards, Commissions and Other Bodies</u> / Meeting | W |                         | 7   | YES |
| Minutes, County Board  | W |                         | 7   | YES |
| Minutes, <u>Other</u> Meetings   | W |                         | 7   | YES |
| <del>Ordinances and Resolutions</del>  | W | -                       | p   | -   |
| Ordinances and Resolutions, Approved   | W |                         | p   |     |
| Ordinances and Resolutions, Drafts   | W |                         | 1   | YES |
| Organizational Charts  | W |                         | S   |     |
| Payment Vouchers (PV)  | W |                         | C   |     |
| Payroll Worksheets   | W |                         | 3   |     |
| Personnel, Applications / Interviews   | W |                         | 6   |     |
| Personnel, Expenses  | W |                         | 6   |     |
| Personnel, Files   | W |                         | 7AT |     |

|  |          |                          |      |            |
|--|----------|--------------------------|------|------------|
| <b>Personnel, Grievances</b>   | <b>W</b> |                          | 7    |            |
| <b>Personnel, Job Descriptions</b>   | <b>W</b> |                          | S    |            |
| <b>Personnel, Performance Tracking (Evaluations)</b>                                   | <b>W</b> |                          | 7 AT |            |
| <b>Personnel, Time Sheets</b>  | <b>W</b> |                          | 2    | <b>YES</b> |
| <b>Policy and Procedure Manuals</b>  | <b>W</b> |                          | S    |            |
| <b>Purchase Orders (PO)</b>  | <b>W</b> |                          | C    | <b>YES</b> |
| <b>Purchase Orders, Blanket</b>  | <b>W</b> |                          | C    | <b>YES</b> |
| <b>Purchase Release Payment Authorization (PRPA)</b>                                   | <b>W</b> |                          | 3    |            |
| <b>Purchase Requisitions</b>   | <b>W</b> |                          | C    |            |
| <b>Receipts, Cash (Received and issued)</b>  | <b>W</b> | WI Stats 59.52(4)(a)(12) | 4    | <b>YES</b> |
| <b>Records Retention Schedules</b>   | <b>W</b> |                          | S    |            |
| <b>Reference Materials (Books, magazines, pamphlets, brochures, newsletters, etc.)</b> | <b>W</b> |                          | S    |            |
| <b>Reports, Routine</b>  | <b>W</b> |                          | 1    | <b>YES</b> |
| <b>Requests for Bids (RFB's)</b>   | <b>W</b> | WI Stats 59.52(4)(a)(10) | 1    |            |

|   |          |                          |   |            |
|---|----------|--------------------------|---|------------|
| <b>Requests for Information (RFI's)</b> | <b>W</b> | WI Stats 59.52(4)(a)(10) | 1 |            |
| <b>Requests for Proposals (RFP's)</b>   | <b>W</b> | WI Stats 59.52(4)(a)(10) | 1 |            |
| <b>Requests for Proposals</b>           | <b>W</b> | WI Stats 59.52(4)(a)(10) | 7 | <b>YES</b> |
| <b>Requests for Proposals, Reviews</b>  | <b>W</b> |                          | 3 |            |
| <b>Service Receipts</b>                 | <b>W</b> |                          | 2 | <b>YES</b> |
| <b>Specifications, Working Papers</b>   | <b>W</b> |                          | S |            |
| <b>State Grant Information</b>          | <b>W</b> |                          | S |            |
| <b>Studies - Drafts</b>                 | <b>W</b> |                          | 7 | <b>YES</b> |
| <b>Studies - Final draft</b>            | <b>W</b> |                          | 7 |            |
| <b>Study, Job Evaluation</b>            | <b>W</b> |                          | S |            |
| <b>Supply Orders</b>                    | <b>W</b> |                          | C | <b>YES</b> |
| <b>Telephone Logs</b>                   | <b>W</b> |                          | C |            |
| <b>Telephone Service Request Form</b>   | <b>W</b> |                          | C |            |
| <b>Training Class Notes</b>             | <b>W</b> |                          | S |            |

|  |          |   |                 |     |
|--|----------|---|-----------------|-----|
| Vehicle Replacement Plan   | W        |   | S               |     |
| Vendor Catalogs  | W        |   | S               |     |
| Vendor Codes   | W        |   | S               |     |
| Vendor Product Safety Data   | W        |   | C               |     |
| Vendor Service Agreements  | W        |   | S               |     |
| <u>Video and Audio Recordings in and around County Buildings</u>   | <u>W</u> |   | <u>121 Days</u> |     |
| Warranty Records   | W        |   | LOP             | YES |
| <b>Historical Society Codes</b>  |          | <b>Retention Codes</b>  |                 |     |
| N = Notify      W = Waived      NA = Not Applicable  |          | AA = After Audit      EVT = Event Date                                    |                 |     |
|  |          | AS = After Settlement      LOP = Life of Product                          |                 |     |
|  |          | AT = After Termination      M = Months                                    |                 |     |
|  |          | C = Current Only      P = Permanent                                       |                 |     |
|  |          | EOM = End of Month      S = Until <del>Supereeded</del> <u>Superseded</u> |                 |     |
|  |          | EOY = End of Year      V = Vital  |                 |     |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |          |   |                 |     |

## Jefferson County Records Retention Schedule

Department: County Administrator

Revised: ~~10/11/2016~~ **2008**

| Record Title   | State Code | Authority  | Retention <u>Period</u> (Years<br><u>are in addition to -Plus</u> Current<br>Year) | Official Copy |
|--|------------|--|--|---------------|
| Records Retention Schedules  | W          |  | S  | YES           |
| Budget, Jefferson County   | W          |  | 7  |               |
| Budget Working Papers  | W          |  | 7  |               |
| Organizational Studies (Historical)  | W          |  | P  | YES           |
| Historical Society Codes   |            | Retention Codes  |  |               |
| N = Notify      W = Waived      NA = Not Applicable  |            | AA = After Audit                      EVT = Event Date<br>AS = After Settlement                LOP = Life of Product<br>AT = After Termination                M = Months<br>C = Current Only                        P = Permanent<br>EOM = End of Month                    S = Until <del>Superceded</del> <u>Superseded</u><br>EOY = End of Year                        V = Vital |  |               |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |            |  |  |               |



## Jefferson County Records Retention Schedule

Department: Central Services

Revised: 10/11/2016/~~2008~~

| Record Title                           | State Code | Authority | <u>Retention Period</u><br>(Years are in addition to<br>Current year)<br><del>Retention Years -<br/>Plus Current Year</del> | Official Copy |
|--|------------|-----------|---|---------------|
| Access Records (key and card)          | W          |           | 1   | YES           |
| Asbestos Files                         | W          |           | P   | YES           |
| Bulk Mail Permit                       | W          |           | 1   | YES           |
| Cleaning Log                           | W          |           | 1   | YES           |
| Construction / Project Drawings        | W          |           | P   | YES           |
| County Building Files                  | W          |           | S   | YES           |
| Demolished Residential Property        | W          |           | P   |               |
| Inspection Reports (Elevator, etc.)    | W          |           | 7   | YES           |
| Inspection Cleaning Evaluation reports | W          |           | 2   | YES           |
| Log, Postage                           | W          |           | 3   | YES           |

| Maintenance Work Order  | W |  | 3  | YES |
|---|---|--|--|-----|
| Maintenance Key Daily Sign Out Sheet  | W |  | S  | YES |
| Natural Gas Usage Manual  | W |  | C  |     |
| Project Files   | W |  | P  | YES |
| Supply Orders   | W |  | 2  | YES |
| Historical Society Codes  |   | Retention Codes  |  |     |
| N = Notify      W = Waived      NA = Not Applicable<br><br><b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |   | AA = After Audit<br>AS = After Settlement<br>AT = After Termination<br>C = Current Only<br>EOM = End of Month<br>EOY = End of Year | EVT = Event Date<br>LOP = Life of Product<br>M = Months<br>P = Permanent<br>S = Until <del>Superseded</del> <u>Superseded</u><br>V = Vital |     |

## Jefferson County Records Retention Schedule

Department: Child Support

Revised: 4/2008 10/11/2016

| Record Title  | State Code   | Authority  | <u>Retention Period</u><br>(Years are in addition to<br>Current Year)<br><del>Retention</del><br><del>Years -- Plus Current</del><br>Year | Official Copy |
|---|--------------|--|---|---------------|
| <b>Child Support Case Records</b><br><u>(Includes all child support files including Divorce, Paternity &amp; Interstate case files)</u> | W            | 45CFR 303.11d                                    | 7   | YES           |
| <del>Child Support Divorce</del>  | <del>W</del> | -  | <del>7</del>  |               |
| Child Support Expenditure Reports and Support Documentation   | W            | <u>45 CFR 74.20-74.25</u><br><u>45 CFR 92.42</u> | <u>43</u>   |               |
| <del>Child Support Records of</del> Required Client Notification <u>(Case Records)</u>  | W            | <u>46 CFR 74.20-74.25</u><br><u>45 CFR 92.42</u> | <u>43</u>   |               |
| Child Support Statistical Reports and Supporting Documentation  | W            | <u>45 CFR 74.20-74.25</u><br><u>45 CFR 92.42</u> | <u>43</u>   |               |
| <del>Client Assistance (Out-of-County)</del>  | <del>W</del> | -  | <del>7</del>  |               |
| <del>Client Listing (Computer Printout)</del>   | <del>W</del> | -  | <del>3M</del>   |               |
| <del>Client Logs</del>  | <del>W</del> | -  | <del>C</del>  | -             |
| <u>IRS Records List</u> <u>Tracking and Disposal Logs</u>   | W            | <u>IRS Publication 1075</u>                      | <u>75</u>   |               |
| <u>IRS Visitor Logs</u>   | <u>W</u>     | <u>IRS Publication 1075</u>                      | <u>5</u>  |               |

|   |          |   |   |            |
|---|----------|---|---|------------|
| <b>Misdemeanor and Felony Support Files</b>                             | <b>W</b> | - | After closed and entry of judgment or divorce or entry of final order + 7 |            |
| <b>Paternity Files, Post-Judgments</b>                                  | <b>W</b> | - | Closed date +7  | <b>YES</b> |
| <b>Paternity Files, Pre-Judgments, Dismissed</b>                        | <b>W</b> | - | 3   | -          |
| <b>Paternity, Pre-Judgments Not Pursued</b>                             | <b>W</b> | - | 3   | -          |
| <b>Reciprocal Support Cases (Interstate Cases - i.e., UIFSA, URESA)</b> | <b>W</b> | - | 7   | -          |
| <b>Warrants and Capias</b>  | <b>W</b> | - | 3   | <b>YES</b> |
|   |          |   |   |            |

| <b>Historical Society Codes</b>  | <b>Retention Codes</b> |   |
|--|------------------------|---|
| N = Notify      W = Waived      NA = Not Applicable  | AA = After Audit       | EVT = Event Date                                  |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> | AS = After Settlement  | LOP = Life of Product                             |
|  | AT = After Termination | M = Months  |
|  | C = Current Only       | P = Permanent                                     |
|  | EOM = End of Month     | S = Until <del>Superseded</del> <u>Superseded</u> |
|  | EOY = End of Year      | V = Vital   |

## Jefferson County Records Retention Schedule

**Department:** Corp Counsel - Legal

**Revised:**  
10/11/13/201608

| Record Title  | Stat<br>e<br>Cod<br>e | Authority  | <u>Retention Period</u><br>(Years are in addition to<br>Current Year)<br><del>Retention<br/>Years - Plus Current<br/>Year</del> | Official Copy |
|---|-----------------------|--|---|---------------|
| Case Files, Litigation  | W                     | After closed or when appeal time has run, whichever is longer or Supreme Court Rules (SCR) +20 |   | YES           |
| Case Files, Non-litigation  | W                     |  | 10  | YES           |
| <b>CHIPS (Child in Need of Protective Services)</b><br>Juvenile Records | W                     |  | 18th birthday + 24  |               |
| Client Collection Files   | W                     |  | 10  |               |
| Client Index Cards  | W                     |  | 5   |               |
| Department Files  |                       |  | EVT + 4   |               |
| Dismissals- <u>Chapter 51-45</u>  | W                     |  | EVT + 7   |               |
| Guardianship <del>Files</del> - Protective Placement <u>Files</u>       | NA                    | SCR 72.01 (33)   | Termination of guardianship<br>+ 7  | YES           |
| Legal Fees, Outside Counsel   | W                     |  | No activity + 5   |               |

|  |     |                        |  |     |
|--|-----|------------------------|--|-----|
| Legal Memos  | W   |                        | 7  |     |
| Legal Opinions   | N/A |                        | P  | YES |
| Liability Claims   | W   |                        | 7  |     |
| Mental Commitment Cases  | W   |                        | File closed date + 10                      |     |
| Parks and Land Use and Environmental Ordinance Enforcement Files   | W   |                        | P  | YES |
| Real Estate Closing Files  | W   |                        | P  |     |
| <b>Historical Society Codes</b>  |     | <b>Retention Codes</b> |  |     |
| N = Notify      W = Waived      NA = Not Applicable  |     | AA = After Audit       | EVT = Event Date                           |     |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |     | AS = After Settlement  | LOP = Life of Product                      |     |
|  |     | AT = After Termination | M = Months                                 |     |
|  |     | C = Current Only       | P = Permanent                              |     |
|  |     | EOM = End of Month     | S = Until Superseded <del>Superseded</del> |     |
|  |     | EOY = End of Year      | V = Vital                                  |     |

## Jefferson County Records Retention Schedule

**Department:** Corp Counsel - Legal

**Revised:** 3/2008

| Record Title                         | State Code | Authority                       | Retention Years<br>- Plus Current<br>Year | Official Copy |
|--------------------------------------|------------|---------------------------------|---|---------------|
| Third Party Liability (TPLs)         | W          | State PRFB (Rev. 5/92<br>90006) | 10  |               |
| Contracts, Working Papers            | W          |                                 | 7   |               |
| Bankruptcy Lists, Master and Monthly | W          |                                 | S   | YES           |
| Grievances                           |            |                                 | Evt + 20                                  |               |
| Labor Negotiations Notes             |            |                                 | P   |               |
| Disciplinary Actions                 |            |                                 | Evt + 6                                   |               |
| County Board Minutes/Agendas         |            |                                 | Evt + 20                                  |               |
|                                      |            |                                 |   |               |
|                                      |            |                                 |   |               |
|                                      |            |                                 |   |               |

|  |                          |                        |                        |   |
|--|--------------------------|------------------------|------------------------|---|
|  |                          |                        |                        |   |
|  |                          |                        |                        |   |
|  |                          |                        |                        |   |
|  |                          |                        |                        |   |
|  |                          |                        |                        |   |
| <b>Historical Society Codes</b>  |                          | <b>Retention Codes</b> |                        |   |
| N = Notify   | W = Waived<br>Applicable | NA = Not               | AA = After Audit       | EVT = Event Date                                  |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |                          |                        | AS = After Settlement  | LOP = Life of Product                             |
|  |                          |                        | AT = After Termination | M = Months  |
|  |                          |                        | C = Current Only       | P = Permanent                                     |
|  |                          |                        | EOM = End of Month     | S = Until <del>Superseded</del> <u>Superseded</u> |
|  |                          |                        | EOY = End of Year      | V = Vital   |

## Jefferson County Records Retention Schedule

Department: Countryside

Revised: 4/200810/11/2016

| Record Title                          | State Code | Authority | Retention Period<br>(Years are in addition to<br>Current<br>Year)Retention<br>Years -- Plus<br>Current Year | Official Copy |
|---------------------------------------|------------|-----------|---|---------------|
| HIPAA Compliance                      | W          |           | 6   |               |
| Absence                               | W          |           | 6   |               |
| Applications (Non-employee)           | W          |           | 2   |               |
| Employee History                      | W          |           | 1AT   |               |
| FMLA Documents                        | W          |           | 3   |               |
| Individual Earnings                   | W          |           | 6AT   |               |
| Classifications/Position Descriptions | W          |           | P   |               |
| Medical                               | W          |           | 30AT  |               |
| OSHA                                  | W          |           | 30AT  |               |

|   |          |  |           |  |
|---|----------|--|-----------|--|
| <b>Payroll</b>  | <b>W</b> |  | 3-6 years |  |
| <b>Payroll Documents Subject to IRS Audit</b>           | <b>W</b> |  | 10+       |  |
| <b>Performance Evaluations</b>                          | <b>W</b> |  | 6AT       |  |
| <b>Personnel Policies</b>                               | <b>W</b> |  | P         |  |
| <b>Rate Schedules, Benefit or Pension Summaries</b>     | <b>W</b> |  | 6         |  |
| <b>Age Discrimination Act Documents</b>                 | <b>W</b> |  | 1AT       |  |
| <b>Civil Rights Act, ADA Documents</b>                  | <b>W</b> |  | 1AT       |  |
| <b>Equal Pay Act Documents</b>                          | <b>W</b> |  | 6         |  |
| <b>Social Security Reports, W-4 Forms, W-2 Forms</b>    | <b>W</b> |  | 6         |  |
| <b>Staffing Schedules/Vacation Listings</b>             | <b>W</b> |  | 3-6 years |  |
| <b>Union Contracts</b>                                  | <b>W</b> |  | P         |  |
| <b>Worker's Compensation Documents</b>                  | <b>W</b> |  | 12        |  |
| <b>I-9 Forms</b>  | <b>W</b> |  | 3+        |  |
| <b>Bank Deposits, Cancelled Checks, Reconciliations</b> | <b>W</b> |  | 3         |  |

|  |          |  |           |  |
|--|----------|--|-----------|--|
| <b>Bank Statements</b>                                 | <b>W</b> |  | <b>8</b>  |  |
| <b>Cash Receipts, Deposits, Receipt Books</b>          | <b>W</b> |  | <b>10</b> |  |
| <b>Correspondence (Credit, Collections, Insurance)</b> | <b>W</b> |  | <b>6</b>  |  |
| <b>General Ledger</b>                                  | <b>W</b> |  | <b>P</b>  |  |
| <b>Invoices (AP and AR)</b>                            | <b>W</b> |  | <b>6</b>  |  |
| <b>Journals &amp; Ledgers (General)</b>                | <b>W</b> |  | <b>P</b>  |  |
| <b>MA Level of Care Approvals</b>                      | <b>W</b> |  | <b>3</b>  |  |
| <b>MA Eligibility, Billings to MA, Medicare</b>        | <b>W</b> |  | <b>6</b>  |  |
| <b>Medicare/Medicaid Cost Reports</b>                  | <b>W</b> |  | <b>7</b>  |  |
| <b>Medicare EOMB's/MA RAs</b>                          | <b>W</b> |  | <b>7</b>  |  |
| <b>Medicare Secondary Payer</b>                        | <b>W</b> |  | <b>10</b> |  |
| <b>Petty Cash</b>                                      | <b>W</b> |  | <b>3</b>  |  |
| <b>Resident Bank &amp; Fund Closing Statements</b>     | <b>W</b> |  | <b>3</b>  |  |
| <b>Withdrawal Slips/Logs (Residents)</b>               | <b>W</b> |  | <b>10</b> |  |

|   |          |  |              |  |
|---|----------|--|--------------|--|
| <b>Food Costs</b>   | <b>W</b> |  | <b>5</b>     |  |
| <b>Meal Counts</b>  | <b>W</b> |  | <b>5</b>     |  |
| <b>Manus, Therapeutic Diets</b>   | <b>W</b> |  | <b>3</b>     |  |
| <b>Blueprints</b>   | <b>W</b> |  | <b>P</b>     |  |
| <b>Building Maintenance &amp; Repair</b>                                | <b>W</b> |  | <b>10</b>    |  |
| <b>Calibration</b>  | <b>W</b> |  | <b>6</b>     |  |
| <b>Equipment, FPA Standards</b>   | <b>W</b> |  | <b>LOP+6</b> |  |
| <b>Equipment Maintenance</b>  | <b>W</b> |  | <b>5</b>     |  |
| <b>Inspection – Building &amp; Grounds</b>                              | <b>W</b> |  | <b>3</b>     |  |
| <b>Maintenance Log</b>  | <b>W</b> |  | <b>6</b>     |  |
| <b>Work Orders</b>  | <b>W</b> |  | <b>3</b>     |  |
| <b>Appointment Schedules</b>  | <b>W</b> |  | <b>3</b>     |  |
| <b>Communicable Disease Reports</b>                                     | <b>W</b> |  | <b>3</b>     |  |
| <b>Controlled Substance Records (Inventory, Orders, Administration)</b> | <b>W</b> |  | <b>3</b>     |  |

|  |   |  |     |  |
|--|---|--|-----|--|
| Correspondence – Resident  | W |  | 6   |  |
| Daily Census Reports   | W |  | 6   |  |
| Disease Index, Resident Index, Admission/Discharge Registers, Statistical Reports                | W |  | P   |  |
| Incident Reports   | W |  | 3   |  |
| In-service, Orientation Programs, Attendance   | W |  | 3   |  |
| MDS Data Collection  | W |  | 18M |  |
| Narcotics, Key Counts, Pharmacy orders   | W |  | 18M |  |
| Purchase Orders, Receipts for Resident personal Use Items, Warranty, DME, Furniture, Electronics | W |  | 6   |  |
| Resident Listings  | W |  | 3   |  |
| Resident Medical and Financial   | W |  | 7   |  |
| Resident Sign-out  | W |  | 1   |  |

**Historical Society Codes**

**Retention Codes**

N = Notify      W = Waived      NA = Not Applicable

AA = After Audit

EVT = Event Date

AS = After Settlement

LOP = Life of Product

AT = After Termination

M = Months

C = Current Only

P = Permanent

**IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).**



EOM = End of Month

S = Until Supersceded

EOY = End of Year

V = Vital

|  |          |                               |                                |            |
|--|----------|-------------------------------|--------------------------------|------------|
| <b>Misdemeanor Cases</b>   | <b>W</b> | WI Stat 978.07 (1)(a)(1)(b)   | EVT+3                          | <b>YES</b> |
| <b>News Releases</b>   | <b>w</b> |                               | DA Discretion                  |            |
| <b>Search Warrants</b>   | <b>W</b> | 978.07(1)(d) absent case file | 6                              |            |
| <b>Subpoena duces tecum</b>  |          | 978.07(1)(d) absent case file | 6                              |            |
| <b>Historical Society Codes</b>  |          | <b>Retention Codes</b>        |                                |            |
| N = Notify      W = Waived      NA = Not Applicable  |          | AA = After Audit              | EVT = Event Date               |            |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |          | AS = After Settlement         | LOP = Life of Product          |            |
|  |          | AT = After Termination        | M = Months                     |            |
|  |          | C = Current Only              | P = Permanent                  |            |
|  |          | EOM = End of Month            | S = Until SupereededSuperseded |            |
|  |          | EOY = End of Year             | V = Vital                      |            |

## Jefferson County Records Retention Schedule

Department: District Attorney

Revised: 10/11/2016~~4/2008~~

| Record Title  | State Code | Authority                     | <u>Retention Period (Years are in addition to Current Year)</u><br><del>Retention Years - Plus Current Year</del> | Official Copy |
|---|------------|-------------------------------|---|---------------|
| Breathalyzer Unit Certification   | W          | WI Stat 978.07 (1)(d)         | Indefinite  | YES           |
| Civil Cases   | N          | WI Stat 978.07 (1)(a), (1)(b) | EVT + 3   | YES           |
| Crime Statistics  | W          | WI Stat 978.07 (1)(d)         | 6   | YES           |
| Deferred Prosecution Agreements   | W          |                               | 6   | YES           |
| Felony or Related Cases   | N          | WI Stat 978.07 (1)(c) 3       | EVT + 10  | YES           |
| Felony or Related Cases Punishable by Life Imprisonment (aka Homicide)                            | N          | WI Stat 978.07 (1)(c) 1       | EVT + 50  | YES           |
| Felony or Related Cases Punishable by a Maximum Period of Imprisonment Equal to at least 20 Years | N          | WI Stat 978.07 (1)(c) 2       | EVT + 20  | YES           |
| Grant Reimbursement Proposals (VAWA/CAW)  | W          |                               | 6   | YES           |
| Juvenile Card File  | W          | SCR 72.03 (2)                 | 4 (following 18th birthday)   | YES           |
| Juvenile Cases - JV / Juvenile Delinquency  | W          | SCR 72.01(41)                 | 8 (following 18th birthday)<br>Class A or B felonies  | YES           |

## Jefferson County Records Retention Schedule

Department: Economic Development

Revised: 10/11/2016/2008

| Record Title   | State Code | Authority | <u>Retention Period</u><br>(Years are in addition to<br>Current Year)<br><del>Retention Years--<br/>Plus Current Year</del> | Official Copy |
|--|------------|-----------|---|---------------|
| Audits, Community Block Grant Program                                | W          |           | 7   |               |
| Economic Development Loan Files                                      | W          |           | 7   | YES           |
| Environmental Reviews  | N          |           | 7   | YES           |
| Fiscal Project Program Plan files                                    | W          |           | 7   |               |
| GEM Grant Application  | W          |           | 3   |               |
| GEM Grant Awards   | W          |           | 7   |               |
| Home Regulations   | W          |           | S   |               |
| Home Rehab Program Loans   | <u>W</u>   |           | 7AS   | YES           |
| Sub Grantee Project Files - CDBG (Community Development Block Grant) | W          |           | 7   |               |
| Sub Grantee Project Files - HOME                                     | W          |           | 7   |               |

| Historical Society Codes   | Retention Codes        |   |
|--|------------------------|---|
| N = Notify      W = Waived      NA = Not Applicable  | AA = After Audit       | EVT = Event Date                                  |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> | AS = After Settlement  | LOP = Life of Product                             |
|  | AT = After Termination | M = Months  |
|  | C = Current Only       | P = Permanent                                     |
|  | EOM = End of Month     | S = Until <del>Superseded</del> <u>Superseded</u> |
|  | EOY = End of Year      | V = Vital   |

## Jefferson County Records Retention Schedule

Department: Emergency Management

Revised: 10/11/2016/2008

| Record Title  | State Code | Authority | <u>Retention Period (Years are in addition to Current Year)</u><br><del>Retention Years</del><br><b>Plus Current Year</b> | Official Copy |
|---|------------|-----------|---|---------------|
| Continuity of Government and Ops Plan                                       | W          |           | S   | YES           |
| County Emergency Operations Plan  | W          |           | S   | YES           |
| Disaster Declarations   | W          |           | 7   | YES           |
| Emergency Ops Plans (private facilities with extremely hazardous materials) |            |           | C+ previous plan  | YES           |
| EPCRA - (Emergency Planning and Community Right to Know Act) Files          | W          |           | S   | YES           |
| Grants - Funded   |            |           | P   |               |
| Private Facilities Plans (copies)   |            |           | S   |               |
| State Information and Guidance Memos  |            |           | S   |               |
| Tier II Hazardous Chemical Reports  | W          |           | 7   | YES           |

| Historical Society Codes   | Retention Codes        |   |
|--|------------------------|---|
| N = Notify      W = Waived      NA = Not Applicable  | AA = After Audit       | EVT = Event Date                                  |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> | AS = After Settlement  | LOP = Life of Product                             |
|  | AT = After Termination | M = Months  |
|  | C = Current Only       | P = Permanent                                     |
|  | EOM = End of Month     | S = Until <del>Superceded</del> <u>Superseded</u> |
|  | EOY = End of Year      | V = Vital   |

## Jefferson County Records Retention Schedule

Department: Fair Park

Revised: 10/11/20164/2008

| Record Title                              | State Code | Authority | <u>Retention Period (Years are in addition to Current Year)</u><br><del>Retention Years</del><br><b>Plus Current Year</b> | Official Copy |
|---|------------|-----------|---|---------------|
| Advertising                               | W          |           | 5   | YES           |
| Camping Registration (Fair Week)          |            |           | 3   | YES           |
| Camping / Miscellaneous Fees              | W          |           | 3   | YES           |
| <b>Data Backup</b>                        | -          | -         | 5   | <b>YES</b>    |
| Drawings / Maps / Blueprints              | W          |           | LOP   | YES           |
| Emergency Information, Seasonal Employees | W          |           | C   |               |
| Equipment Maintenance                     | W          |           | LOP   | YES           |
| Entertainment Contracts                   |            |           | 5   |               |
| Events and Programs                       | N          |           | 10  | YES           |
| Fair Park Committee Meeting Minutes       |            |           | 7   |               |

|                                    |   |   |         |     |
|------------------------------------|---|---|---------|-----|
| Fair Registrations                 |   |   | EVT + 7 | YES |
| Gate Receipts                      | - | - | 7       | YES |
| Grants                             | W |   | 3       |     |
| Incident Reports                   | W |   | 7       |     |
| Judge's Contracts                  |   |   | 7       | YES |
| Judging Sheets, Checks and Reports |   |   | 7       | YES |
| Publicity Newsletter Insert        |   |   | 3       |     |
| Receipts, Petty Cash               |   |   | 7       |     |
| Safety Inspection Report           | W |   | 7       |     |
| Schedules, Personnel               | W |   | 3       | YES |
| Shipping / Packing Slips           | W |   | 1       | YES |
| Survey Summaries                   | W |   | 2       | YES |
| Volunteer Information              |   |   | 7       | YES |

| Historical Society Codes   | Retention Codes        |   |
|--|------------------------|---|
| N = Notify      W = Waived      NA = Not Applicable  | AA = After Audit       | EVT = Event Date                                  |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> | AS = After Settlement  | LOP = Life of Product                             |
|  | AT = After Termination | M = Months  |
|  | C = Current Only       | P = Permanent                                     |
|  | EOM = End of Month     | S = Until <del>Superseded</del> <u>Superseded</u> |
|  | EOY = End of Year      | V = Vital   |



## Jefferson County Records Retention Schedule

Department: ~~Finance Clerk~~ Accounting

Revised:  
10/11/2016~~3/2008~~

| Record Title                          | Sta<br>te<br>Co<br>de | Authority                       | <u>Retention Period</u><br>(Years are in addition to<br>Current Year) <del>Retention<br/>Years - Plus Current<br/>Year</del> | Official Copy |
|---------------------------------------|-----------------------|---------------------------------|--|---------------|
| 1099 Data                             | W                     |                                 | 10   | YES           |
| Benefit Bank Balance                  | W                     |                                 | 10   | YES           |
| Billings, Department Backup - Finance | W                     |                                 | 7  | YES           |
| Cash Receipts                         | W                     | State PRFB (Rev. 5/92)<br>90006 | 7  | YES           |
| Check Copies                          | W                     | State PRFB (Rev. 5/92)<br>90013 | 7  | YES           |
| Check Registers                       | W                     |                                 | 7  | YES           |
| County Payroll Tax Records            | W                     |                                 | 10   | <u>YES</u>    |
| Cost Allocation Plan                  | W                     |                                 | 7  | YES           |
| Debt Service                          | W                     |                                 | 7  | YES           |
| Deferred Compensation Payments        | W                     | State PRFB (2/15/95)<br>90209A  | 10   | YES           |

|  |          |  |         |            |
|--|----------|--|---------|------------|
| <b>Deposits</b>  | <b>W</b> | State PRFB (Rev. 5/92)<br>90012  | 7       | <b>YES</b> |
| <b>Edit Reports</b>  | <b>W</b> |  | 1       |            |
| <b>Employee Payroll Document Case Records</b>  | <b>W</b> | State PRFB (2/15/95) 90214   | EVT + 5 | <b>YES</b> |
| <b>Historical Society Codes</b>  |          | <b>Retention Codes</b>   |         |            |
| N = Notify      W = Waived      NA = Not Applicable  |          | AA = After Audit                      EVT = Event Date                                     |         |            |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |          | AS = After Settlement                      LOP = Life of Product                           |         |            |
|  |          | AT = After Termination                      M = Months                                     |         |            |
|  |          | C = Current Only                              P = Permanent                                |         |            |
|  |          | EOM = End of Month                              S = Until Superseded <del>Superseded</del> |         |            |
|  |          | EOY = End of Year                              V = Vital                                   |         |            |

## Jefferson County Records Retention Schedule

Department: Clerk Finance - Accounting

Revised:  
10/11/20163/2008

| Record Title                                | Stat<br>e<br>Cod<br>e | Authority                      | Retention Years<br>- Plus Current<br>Year | Official Copy  |
|---|-----------------------|--------------------------------|---|----------------|
| Federal Grant Application for Reimbursement | W                     |                                | 7   |                |
| Financial Reports EOY                       | W                     |                                | 15  | YES            |
| Fixed Assets                                | W                     |                                | 7   | YES            |
| Fund Balance Analysis                       | W                     |                                | 7   | YES            |
| <del>Fund-14, EOM</del>                     | <del>W</del>          | <del>-</del>                   | <del>7</del>                              | <del>YES</del> |
| <del>Fund-Transfers</del>                   | <del>W</del>          | <del>-</del>                   | <del>3</del>                              | <del>YES</del> |
| General Journal                             | W                     |                                | 7   | YES            |
| General Ledger Report, EOY                  | W                     | Adm. Code Sec. 2-518 (Pg. 111) | 15  | YES            |
| General Journal Vouchers                    | W                     | State PRFB (Rev. /92) 9006     | 7   | YES            |

|  |   |                                   |   |     |
|--|---|-----------------------------------|---|-----|
| Journal Entries  | W |                                   | 7   | YES |
| Journal Vouchers   | W | State PRFB (Rev. 5/92)<br>90006   | 7   | YES |
| Leave of Absence (LOA)   | W |                                   | 7   | YES |
| Ledger Card Reports, End of Year   | W | -                                 | 7   | YES |
| Norwest Client Analysis  | W | -                                 | 3   | -   |
| Payment Vouchers (Includes Vendor Invoice)   | W | State PRFB-2 (Rev. 5/92)<br>90007 | 7   | YES |
| <b>Historical Society Codes</b>  |   | <b>Retention Codes</b>            |   |     |
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| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |   | AS = After Settlement             | LOP = Life of Product                             |     |
|  |   | AT = After Termination            | M = Months  |     |
|  |   | C = Current Only                  | P = Permanent                                     |     |
|  |   | EOM = End of Month                | S = Until <del>Superseded</del> <u>Superseded</u> |     |
|  |   | EOY = End of Year                 | V = Vital   |     |

## Jefferson County Records Retention Schedule

Department: Clerk-Finance - Accounting

Revised:  
10/11/20163/2008

| Record Title                                     | State Code | Authority                    | Retention Years - Plus Current Year | Official Copy |
|--|------------|------------------------------|-------------------------------------|---------------|
| Payroll Adjustments                              | W          |                              | 10                                  | YES           |
| Payroll Change Notices                           | W          |                              | 10                                  | YES           |
| Payroll Corrections                              | W          | State PRFB (2/15/95) 90210   | 10                                  | YES           |
| Payroll General Ledger Report                    | W          |                              | 7                                   | YES           |
| Payroll Input Reports                            | W          | State PRFB (2/15/95) 90206   | 10                                  | YES           |
| Payroll Registers, Master                        | W          | State PRFB (2/15/95) 90016   | 35                                  | YES           |
| Payroll Registers, Duplicate Division Fiche Copy | W          | State PRFB (2/15/95) 90209A  | 10                                  | YES           |
| Payroll Systems - PAPS Microfiche                | W          | State PRFB (2/15/95) 90016   | 10                                  | YES           |
| Payroll Worksheets                               | W          |                              | 10                                  | YES           |
| Payroll - X Press Check Copies                   | W          | State PRFB (Rev. 5/92) 90013 | 10                                  | YES           |



## Jefferson County Records Retention Schedule

**Department:** Finance Clerk - Accounting

**Revised:**  
10/11/20163/2008

| Record Title  | State Code | Authority                       | Retention Years - Plus Current Year | Official Copy |
|---|------------|---------------------------------|-------------------------------------|---------------|
| Reconciliations, Working Papers   | W          | State PRFB (Rev. 5/92)<br>90005 | 7                                   | YES           |
| Retirement Earnings & Social Security Reports                                 | W          |                                 | 15                                  | YES           |
| Routine Internal Status and Activity Reports (Weekly, Monthly, and Quarterly) | W          |                                 | S                                   | YES           |
| Tax Apportionment   | W          |                                 | 7                                   | YES           |
| Tax Levy  | W          |                                 | 7                                   | YES           |
| Trust and Agency Records  | W          |                                 | 7                                   | YES           |
| Vacation Carryovers and Accruals  | W          |                                 | 10                                  | YES           |
| Vehicle Replacement Plan  | W          |                                 | 10                                  |               |
| Vendor Codes  | W          |                                 | S                                   | YES           |
| Vendor Listings   | W          |                                 | 7                                   | YES           |



## Jefferson County Records Retention Schedule

**Department:** FinanceGlerk - Accounting

**Revised:**  
10/11/20163/2008

| Record Title  | State Code | Authority                        | Retention Years - Plus Current Year | Official Copy |
|---|------------|----------------------------------|-------------------------------------|---------------|
| Annual Report, Financial, (CAFR)  | W          |                                  | 10                                  | YES           |
| Audit, Outside  | W          |                                  | 10                                  | YES           |
| Bond Issues, History (Promissory Notes)   | W          | WI STATS 59.52 (4)(a)(8)         | 10                                  |               |
| Chart of Accounts Object Codes - Jefferson County                                       | W          |                                  | S                                   | YES           |
| Internal Fiscal Correspondence, Memos, Policy & Procedures, and Reports                 | W          | State PRFB (Rev. 5/92)<br>90000  | 4                                   | YES           |
| Internal Fiscal Correspondence, Memos, Policy & Procedures, and Reports, Working Papers | W          | State PRFB (Rev. 5/92)<br>90000A | 1                                   | YES           |
| Mileage Logs - Monthly  | W          |                                  | 7                                   | YES           |
| Non-Routine Financial Reports and Studies   | W          | State PRFB (Rev. 5/92)<br>90003  | 7                                   | YES           |
| Non-Routine Financial Reports and Studies, Working Papers                               | W          | State PRFB (Rev. 5/92)<br>90003  | S                                   | YES           |
| State Fiscal Policies and Procedures Records (Official)                                 | W          | State PRFB (Rev. 5/92)<br>90001  | 10                                  |               |

|  |   |                                  |   |     |
|--|---|----------------------------------|---|-----|
| State Fiscal Policies and Procedures Records, Updates and Working Papers   | W | State PRFB (Rev. 5/92)<br>90001A | S   |     |
| Audit, Internal - Working Papers   | W |                                  | 10  | YES |
| Capital Project Documentation  | W |                                  | 5   |     |
| Commodity / Vendor Codes   | W | -                                | C   | YES |
| Vendor Database, BAS   | W | -                                | S   | -   |
| <b>Historical Society Codes</b>  |   | <b>Retention Codes</b>           |   |     |
| N = Notify      W = Waived      NA = Not<br>Applicable   |   | AA = After Audit                 | EVT = Event Date                                  |     |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |   | AS = After Settlement            | LOP = Life of Product                             |     |
|  |   | AT = After Termination           | M = Months  |     |
|  |   | C = Current Only                 | P = Permanent                                     |     |
|  |   | EOM = End of Month               | S = Until <del>Supereeded</del> <u>Superseded</u> |     |
|  |   | EOY = End of Year                | V = Vital   |     |

## Jefferson County Records Retention Schedule

Department: FinanceClerk - Budget

Revised:  
10/11/20163/2008

| Record Title   | State Code | Authority                | Retention Years - Plus Current Year | Official Copy |
|--|------------|--------------------------|-------------------------------------|---------------|
| Bond Issues, History (Promissory Notes)  | W          | WI STATS 59.52 (4)(a)(8) | 10                                  |               |
| Budget, Departmental   | W          |                          | 7                                   | YES           |
| Budget, Staff Reports  | W          |                          | 7                                   | YES           |
| Budget, Jefferson County   | W          |                          | 10                                  | YES           |
| Capital Borrowing  | W          |                          | 10                                  | YES           |
| Capital Projects   | W          |                          | 10                                  | YES           |
| <b>Historical Society Codes</b>  |            | <b>Retention Codes</b>   |                                     |               |
| N = Notify      W = Waived      NA = Not<br>Applicable   |            | AA = After Audit         | EVT = Event Date                    |               |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |            | AS = After Settlement    | LOP = Life of Product               |               |
|  |            | AT = After Termination   | M = Months                          |               |
|  |            | C = Current Only         | P = Permanent                       |               |
|  |            |                          |                                     |               |

EOM = End of Month

S = Until ~~Superceded~~Superseded

EOY = End of Year

V = Vital

## Jefferson County Records Retention Schedule

Department: Health - Administration

Revised:  
10/11/20163/2008

| Record Title  | State Code | Authority    | <u>Retention Period (Years are in addition to Current Year)</u><br><del>Retention Years - Plus Current Year</del> | Official Copy |
|---|------------|--------------|---|---------------|
| Mission statement, philosophy, purpose                        | <u>W</u>   | s. 19.21     | 7   | Yes           |
| Agency goals, objectives, short and long term strategic plans | <u>W</u>   | s. 19.21     | 7   | Yes           |
| Agency program evaluation                                     | <u>W</u>   | s. 19.21     | 7   | Yes           |
| Grants  | <u>W</u>   | s. 19.21     | 7   |               |
| Annual reports  | <u>W</u>   | s. 19.21     | P   | Yes           |
| WIC   | <u>W</u>   | 7CCFR 246.25 | 3 fiscal years + 150 days   | Yes           |
| Birth Certificate information                                 | <u>W</u>   | s.69.20(3)©  | Not longer than 1   | No            |
| Client record/Patient care record                             | <u>W</u>   | x. 19.21     | 7   | Yes           |
| Family Care   | <u>W</u>   | x. 19.21     | 7   | Yes           |
| Short term  | <u>W</u>   | x. 19.21     | 7   | Yes           |

|  |          |   |   |     |
|--|----------|---|---|-----|
| Health Check/Well child  | <u>W</u> | x. 19.21  | Y | Yes |
| <b>Historical Society Codes</b>  |          | <b>Retention Codes</b>  |   |     |
| N = Notify      W = Waived      NA = Not Applicable  |          | AA = After Audit      EVT = Event Date                                    |   |     |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |          | AS = After Settlement      LOP = Life of Product                          |   |     |
|  |          | AT = After Termination      M = Months                                    |   |     |
|  |          | C = Current Only      P = Permanent                                       |   |     |
|  |          | EOM = End of Month      S = Until <del>Superseded</del> <u>Superseded</u> |   |     |
|  |          | EOY = End of Year      V = Vital  |   |     |

## Jefferson County Records Retention Schedule

**Department:** Health - Communicable Disease

**Revised:**  
10/11/2016~~3/2008~~

| Record Title  | State Code | Authority              | <u>Retention Period</u><br>(Years are in addition to<br>Current<br>Year) <del>Retention</del><br>Years -- Plus<br>Current Year | Official Copy |
|---|------------|------------------------|--|---------------|
| Immunization  | <u>W</u>   | x. 19.21               | P = Permanent  | Yes           |
| Signature of person to receive vaccine or authorized to make request for immunization                       | <u>W</u>   |                        | P = Permanent  | Yes           |
| Immunization Administration   | <u>W</u>   |                        | P = Permanent  |               |
| Communicable Disease Reports (4151) - Local copy.   | <u>W</u>   |                        | 7  |               |
| STD Report (4343) - Local copy  | <u>W</u>   |                        | 7  |               |
| Communicable Disease Outbreak (DOH 4142 and DOH 9081)   | <u>W</u>   |                        | 7  |               |
| Historical Society Codes  |            | Retention Codes        |  |               |
| N = Notify      W = Waived      NA = Not Applicable   |            | AA = After Audit       | EVT = Event Date   |               |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper,</b> |            | AS = After Settlement  | LOP = Life of Product  |               |
|   |            | AT = After Termination | M = Months   |               |

electronically, digitally, microform, etc.).

C = Current Only

P = Permanent

EOM = End of Month

S = Until ~~Superceded~~Superseded

EOY = End of Year

V = Vital

## Jefferson County Records Retention Schedule

**Department:** Health - Environmental Health

**Revised:**  
10/11/2016/~~2008~~

| Record Title   | State Code | Authority              | <b>Retention Period</b><br>(Years are in addition to Current Year)<br><del>Retention Years - Plus Current Year</del> | Official Copy |
|--|------------|------------------------|--|---------------|
| Licensed Establishments Inspection Reports   | <u>W</u>   | x50.535 and HFS 192    | 3  | Yes           |
| Water Sample Reports   | <u>W</u>   |                        | 7  | Yes           |
| Health Hazard Investigations   | <u>W</u>   |                        | 7  | Yes           |
| Environmental Health   | <u>W</u>   |                        | 7  | Yes           |
| Historical Society Codes   |            | Retention Codes        |  |               |
| N = Notify      W = Waived      NA = Not Applicable  |            | AA = After Audit       | EVT = Event Date   |               |
| <b>IMPORTANT NOTE:</b> The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.). |            | AS = After Settlement  | LOP = Life of Product  |               |
|  |            | AT = After Termination | M = Months   |               |
|  |            | C = Current Only       | P = Permanent  |               |
|  |            | EOM = End of Month     | S = Until <del>Supereceded</del> <u>Superseded</u>   |               |
|  |            | EOY = End of Year      | V = Vital  |               |



## Jefferson County Records Retention Schedule

Department: Highway

Revised: 10/11/2016/~~2008~~

| Record Title                           | State Code | Authority               | <u>Retention Period</u><br><u>(Years are in addition to</u><br><u>Current Year)</u> Retention<br><del>Years</del> <b>Plus Current</b><br><del>Year</del> <b>Year</b> | Official Copy |
|--|------------|-------------------------|--|---------------|
| Accident Reports (Current Employees)   | W          |                         | C  |               |
| Acquisition Files (Right of Way Files) | W          |                         | P  | YES           |
| Auctioned Vehicles                     | W          | WI Stats. 59.52(4)(a)10 | 3  | YES           |
| Bids, Successful                       | W          |                         | LOP  | YES           |
| Bids, Unsuccessful                     | W          |                         | 1AA  | YES           |
| Bridge Plans                           | W          |                         | LOP  | YES           |
| Bridge Sufficiency Ratings             | W          |                         | LOP  | YES           |
| CHEMS Printouts                        | W          |                         | 1  | YES           |
| Construction/Project Drawings          | W          |                         | LOP  | YES           |
| Cost Sheets, Vehicle                   | W          |                         | LOP  | YES           |

|  |   |                        |  |     |
|--|---|------------------------|--|-----|
| Equipment Files  | W |                        | LOP  | YES |
| Fuel Reports   | W | WI Stats. 168.13       | 4  |     |
| Fuel Tickets   | W |                        | 4  |     |
| Inventory, Materials   | W |                        | 7  | YES |
| Local Road Improvement Program Record  | W |                        | 5  | YES |
| <b>Historical Society Codes</b>  |   | <b>Retention Codes</b> |  |     |
| N = Notify      W = Waived      NA = Not Applicable  |   | AA = After Audit       | EVT = Event Date                           |     |
|  |   | AS = After Settlement  | LOP = Life of Product                      |     |
|  |   | AT = After Termination | M = Months                                 |     |
|  |   | C = Current Only       | P = Permanent                              |     |
|  |   | EOM = End of Month     | S = Until Superceded <del>Superseded</del> |     |
|  |   | EOY = End of Year      | V = Vital                                  |     |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |   |                        |  |     |

Jefferson County Records Retention Schedule

Department: Human Resources

Revised: ~~10/11/2016~~ 2008

| Record Title                                 | State Code | Authority                        | <u>Retention Period</u><br><u>(Years are in</u><br><u>addition to Current</u><br><u>Year)</u> <del>Retention</del><br><del>Years--</del><br><del>Plus Current Year</del> | Official Copy |
|--|------------|----------------------------------|--|---------------|
| Loan Verifications                           | W          |                                  | 3 M  |               |
| New Hire Reports                             |            |                                  |  |               |
| Organizational Charts                        | W          |                                  | S  | YES           |
| Personnel, Applications (Not Hired)          | W          | PRB <del>Letter</del> , 11/30/99 | 6  | YES           |
| Personnel, Employees on Leave of Absence Rep | W          |                                  | 3  | YES           |
| Personnel, Files                             | W          |                                  | 7 AT   | YES           |
| Personnel, Job Posting                       | W          |                                  | 10   | YES           |
| Personnel, Newspaper Advertising             | W          |                                  | 5  | YES           |
| Personnel, Overtime Slips                    | W          |                                  | 2 M  | YES           |
| Personnel, Policy & Procedures Manuals       | W          |                                  | S  | YES           |
| Recruitment List                             | W          |                                  | C  | YES           |

|  |   |  |                   |     |
|--|---|--|-------------------|-----|
| Salary Schedules   |   |  | 7                 |     |
| Sheriff's Civil Service Committee Minutes <del>(close)</del> | W |  | 10                | YES |
| Training and Development Attendance Log                      | W |  | <u>4 yrs. + C</u> | YES |
| Training and Development Programs                            | W |  | <u>4 yrs. + C</u> | YES |
| Training Library Log   | W |  | <u>4 yrs. + C</u> | YES |
| <i>Benefits</i>  |   |  |                   |     |
| Employee Cobra Benefits                                      | W |  | Life of Insured   | YES |
| Employee Master Benefits File                                | W |  | 3                 | YES |

**Jefferson County Records Retention Schedule**

Department: Human Resources

Revised: 10/11/2016/2008

| Record Title             | State Code | Authority       | <u>Retention Period</u><br>(Years are in addition to Current Year) <u>Retention Years</u> - | Official Copy |
|--------------------------|------------|-----------------|---|---------------|
| Loss Control Reports     | N/A        |                 | P   | YES           |
| OSHA 200 Log             | W          | 29 CFR 1904.6   | 5   | YES           |
| <u>Training Records</u>  | <u>W</u>   |                 | <u>4 yrs. + C</u>   | <u>YES</u>    |
| Historical Society Codes |            | Retention Codes |   |               |

N = Notify W = Waived NA = Not Applicable

**IMPORTANT NOTE:** The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).

AA = After Audit

EVT = Event Date

AS = After Settlement

LOP = Life of Product

AT = After Termination

M = Months

C = Current Only

P = Permanent

EOM = End of Month S = Until ~~Superseded~~ Superseded



## Jefferson County Records Retention Schedule

**Department:** Human Services - Administration

**Revised:**  
10/11/20163/2008

| Record Title   | State Code | Authority | <u>Retention Period</u><br>(Years are in addition to Current Year)<br><del>Retention Years</del><br>-Plus Current Year | Official Copy |
|--|------------|-----------|--|---------------|
| Accounts Payable Documentation                       | W          |           | 3  |               |
| Accounts Receivable Cash Receipt, Detail *           | W          |           | 3  |               |
| Accounts Receivable Client Records *                 | W          |           | 3  | YES           |
| ATA (Advanced Technology Associates) Purged Accounts | N/A        |           | P  | YES           |
| AODA Denial List                                     | W          |           | 3 M  |               |
| Audit Reports - Vendor                               | W          |           | 3  |               |
| Background Checks                                    | W          |           | 7  |               |
| Bankruptcy Reports                                   | W          |           | 7  |               |
| Bank Statements                                      | W          |           | 3  |               |

|  |     |                        |  |  |
|--|-----|------------------------|--|--|
| BASIC Petty Cash Vouchers  | W   |                        | 3                                      |  |
| Budget Working Papers  | W   |                        | P                                      |  |
| Cancelled Checks / Statements *  | W   |                        | 3                                      |  |
| CARS (Community Aids Reporting System) Reports *   | W   |                        | 3                                      |  |
| Cash Grant Vouchers  | W   |                        | 3                                      |  |
| Certification of Destruction (Records)   | N/A |                        | P                                      |  |
| <b>Historical Society Codes</b>  |     | <b>Retention Codes</b> |  |  |
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|  |     | AT = After Termination | M = Months                             |  |
|  |     | C = Current Only       | P = Permanent                          |  |
|  |     | EOM = End of Month     | S = Until Superseded <u>Superseded</u> |  |
|  |     | EOY = End of Year      | V = Vital                              |  |

## Jefferson County Records Retention Schedule

**Department:** Human Services - Administration

**Revised:**  
10/11/2016~~3/2008~~

| Record Title  | State Code | Authority     | <u>Retention Period</u><br><u>(Years are in addition to Current Year)</u><br><del>Retention Years</del><br><del>- Plus Current Year</del> | Official Copy |
|---|------------|---------------|---|---------------|
| Client Refunds  | W          |               | 3   |               |
| Contracts   | W          |               | 3   |               |
| COP Payments (Community Options Program)                                    | W          |               | 3   |               |
| Deposit Slips (Refund and Collection)                                       | W          |               | 3   |               |
| Employee Expense Accounts   | W          |               | 3   |               |
| HIPAA Documentation (Health Insurance Portability and Accountability Act) * | W          | HIPAA 164.530 | 6   |               |
| In-service Travel Data  | W          |               | 3   | YES           |
| Patient Billing Activity Logs *   | W          |               | 3   | YES           |
| <u>Protective</u> Payee Documents <u>and Records</u>                        | W          |               | <u>P3</u>   |               |

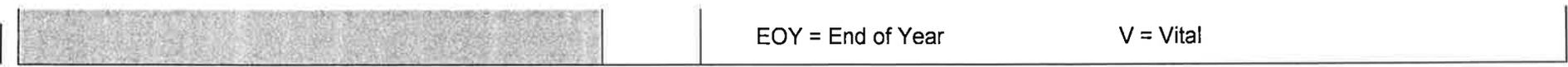
|  |                 |                        |   |            |
|--|-----------------|------------------------|---|------------|
| <b>Payee Records</b>   | <b>W</b>        |                        | <b>3</b>  | <b>YES</b> |
| Payroll, Group Homes   | <b>W</b>        |                        | 3   | <b>YES</b> |
| <b><u>Payroll Reports/Summaries</u></b>  | <b><u>W</u></b> |                        | <b><u>7</u></b>                                   |            |
| <b>Policies and Procedures (Records Related)</b>   | <b>W</b>        |                        | EVT   |            |
| <b>Reconciliation Working Papers *</b>   | <b>W</b>        | HHS 54.06 (2) (a) (6)  | P   |            |
| <b>State Reports (942/943)</b>   | <b>N/A</b>      |                        | P   |            |
| <b>Targeted Case Reviews</b>   | <b>W</b>        |                        | 5   |            |
| <b>Historical Society Codes</b>  |                 | <b>Retention Codes</b> |   |            |
| N = Notify    W = Waived    NA = Not Applicable  |                 | AA = After Audit       | EVT = Event Date                                  |            |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |                 | AS = After Settlement  | LOP = Life of Product                             |            |
|  |                 | AT = After Termination | M = Months  |            |
|  |                 | C = Current Only       | P = Permanent                                     |            |
|  |                 | EOM = End of Month     | S = Until <del>Superseded</del> <u>Superseded</u> |            |
|  |                 | EOY = End of Year      | V = Vital   |            |

## Jefferson County Records Retention Schedule

**Department:** Human Services - Administration

**Revised:**  
10/11/2016/2008

| Record Title   | State Code | Authority              | <b>Retention Period</b><br><i>(Years are in addition to Current Year)</i><br><b>Retention Years - Plus Current Year</b> | Official Copy |
|--|------------|------------------------|---|---------------|
| Targeted Case Reviews / Error Reduction / Correspondence   | W          |                        | 5   |               |
| Tax Intercept  | W          |                        | 3   |               |
| Tax Intercept (Computer Printout)  | W          |                        | 3   |               |
| <u>Timesheets</u>  | <u>W</u>   |                        | <u>7</u>  |               |
|  |            |                        |   |               |
| Historical Society Codes   |            | Retention Codes        |   |               |
| N = Notify      W = Waived      NA = Not Applicable  |            | AA = After Audit       | EVT = Event Date  |               |
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|  |            | EOM = End of Month     | S = Until <u>Superseded</u>   |               |



EOY = End of Year

V = Vital

## Jefferson County Records Retention Schedule

**Department:** Human Services - Family

**Revised:**  
10/11/2016/2008

| Record Title   | State Code | Authority         | <u>Retention Period</u><br>(Years are in addition to Current Year)<br><del>Retention Years</del><br>- Plus Current Year | Official Copy |
|--|------------|-------------------|---|---------------|
| Adolescent & Family Services Case Manager Lists  | W          |                   | C   |               |
| Adolescent & Family Services Client Index Card File  | W          |                   | C   |               |
| Adolescent & Family Services Client Listing  | W          |                   | C   |               |
| Adolescent & Family Services Client Logs   | W          |                   | C   |               |
| Adolescent & Family Services Client Records  | W          | HSS 92.12 (2) (4) | 7   | YES           |
| <u>Alternate Care Billing (for Juveniles) including Group Home, Respite and Foster Care for Children</u> | <u>W</u>   |                   | <u>7</u>  |               |
| Daily Staff Attendance Reports   | W          |                   | 3   | YES           |
| Petty Cash Vouchers  | W          |                   | 3   |               |
| Request for Leave, Employee  | W          |                   | 1   |               |

|  |          |                        |  |     |
|--|----------|------------------------|--|-----|
| Resident Medication Log *  | N/A      |                        | C  | YES |
| Child & Family Case Manager Lists  | W        |                        | C  |     |
| Child & Family Client Records  | W        |                        | 7 years after client turns 19 years old?                           | YES |
| Child & Family Client Listing  | W        |                        | 1 M  |     |
| Foster Homes Licensed Records *  | W        |                        | 7  |     |
| <u>Foster Care Licensing Records</u>   | <u>W</u> |                        | <u>7 years from date of expiration on license</u>                  |     |
| Child & Family Terminated Parental Rights / Adoption Client Records  |          |                        | Case close date or date of last activity, whichever is longer + 25 |     |
| Child Long Term Support - Autism Records   |          |                        | 7  |     |
| <b>Historical Society Codes</b>  |          | <b>Retention Codes</b> |  |     |
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| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |          | AS = After Settlement  | LOP = Life of Product  |     |
|  |          | AT = After Termination | M = Months   |     |
|  |          | C = Current Only       | P = Permanent  |     |
|  |          | EOM = End of Month     | S = Until <del>Superseded</del> <del>Superseded</del>              |     |
|  |          | EOY = End of Year      | V = Vital  |     |

## Jefferson County Records Retention Schedule

**Department:** Human Services - Family

**Revised:**  
10/11/2016~~3/2008~~

| Record Title   | State Code | Authority              | <u>Retention Period</u><br>(Years are in addition to Current Year)<br><del>Retention Years</del><br>- Plus Current Year | Official Copy |
|--|------------|------------------------|---|---------------|
| Child Abuse and Neglect / Child Welfare Client Records   | W          | WISACWIS               | 7   |               |
| <u>Other Client Records Including APS/MH-AODA/CSP/CCS/Lueder Haus/Dr. Haggart client files</u>   | <u>W</u>   |                        | <u>7 years after services have ended</u>  |               |
| Certified Child Care File  | W          |                        | 7   |               |
| Kinship Care Client Records  | W          |                        | 7   |               |
|  |            |                        |   |               |
| Historical Society Codes   |            | Retention Codes        |   |               |
| N = Notify      W = Waived      NA = Not Applicable  |            | AA = After Audit       | EVT = Event Date  |               |
| <b>IMPORTANT NOTE:</b> The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.). |            | AS = After Settlement  | LOP = Life of Product   |               |
|  |            | AT = After Termination | M = Months  |               |
|  |            | C = Current Only       | P = Permanent   |               |
|  |            | EOM = End of Month     | S = Until <del>Supereeded</del> <u>Superseded</u>   |               |



EOY = End of Year

V = Vital

## Jefferson County Records Retention Schedule

**Department:** Human Services - Long Term Care

**Revised:**  
10/11/2016~~3/2008~~

| Record Title   | State Code | Authority | <b>Retention Period (Years are in addition to Current Year) Retention Years -- Plus Current Year</b> | Official Copy |
|--|------------|-----------|--|---------------|
| Long Term Care Case Manager Lists  | W          |           | C  |               |
| <del>Long Term Care Client Listing</del> <u>Aging and Disability Resource Center - Information and Assistance</u>                                | W          |           | 1M   |               |
| <del>Aging and Disability Resource Center - Phone Logs and Enrollments</del> <u>Long Term Care Client Records - Developmentally Disabilities</u> | W          |           | 7  |               |
| <u>Alzheimer's Family Caregiver Funding Records</u>  | <u>W</u>   |           | <u>7</u>   |               |
| <u>National Family Caregiver Funding Records</u>   | <u>W</u>   |           | <u>7</u>   |               |
| <u>Title III Housekeeping Program Records</u>  | <u>W</u>   |           | <u>7</u>   |               |

### Historical Society Codes

N = Notify      W = Waived      NA = Not Applicable

**IMPORTANT NOTE:** The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally,

### Retention Codes

AA = After Audit

EVT = Event Date

AS = After Settlement

LOP = Life of Product

AT = After Termination

M = Months

microform, etc.).

C = Current Only

P = Permanent

EOM = End of Month

S = Until ~~Superceded~~Superseded

EOY = End of Year

V = Vital

## Jefferson County Records Retention Schedule

Department: Human Services - Senior Services

Revised:  
10/11/2016/2008

| Record Title   | State Code | Authority                           | <u>Retention Period</u><br><u>(Years are in addition</u><br><u>to Current Year)</u><br><u>Retention Years</u><br><u>- Plus Current</u><br><u>Year</u> | Official Copy |
|--|------------|-------------------------------------|---|---------------|
| Area Agency on Aging Reports - includes Nutritional Meal Program Summary   | W          |                                     | 7   | YES           |
| Benefit Specialist Client Files  | W          | WI Stats 46.81 & 59.52 & HSS 245.03 | 7   | YES           |
| Benefit Specialist Reports   | W          | WI Stats 46.81                      | S   | YES           |
| Cancelled Checks - Nutrition Sites   | W          | WI Stats 59.52                      | 3   | YES           |
| Client Assessments for Home Delivered Meals and Supportive Services        | W          |                                     | 3   | YES           |
| Client Donation Deposits   | W          |                                     | 3   | YES           |
| Client Files - Includes Complaints, HDM Assessments and Pre-authorizations | W          | WI Stats 59.52                      | 7   | YES           |
| Client Nutrition Site Changes, Site Counts and Daily Meal Counts *         | W          |                                     | 3   | YES           |
| Client Statements (Revenue received)                                       | W          |                                     | 3   | YES           |

|  |   |                        |   |     |
|--|---|------------------------|---|-----|
| Commission on Aging - Minutes, Agendas and Business Related Materials  | N |                        | 7   | YES |
| Complaint Grievance Files  | W |                        | 3   | YES |
| Congregate Billings  | W |                        | 3   |     |
| Congregate Participant Log Book  | W |                        | 7   | YES |
| <del>Congregate</del> <u>Congregate</u> Registration Forms *   | W |                        | 7   | YES |
| Elder Abuse Reports  | W | WI Stats 46.90         | 7   | YES |
| <b>Historical Society Codes</b>  |   | <b>Retention Codes</b> |   |     |
| N = Notify      W = Waived      NA = Not Applicable  |   | AA = After Audit       | EVT = Event Date                                  |     |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |   | AS = After Settlement  | LOP = Life of Product                             |     |
|  |   | AT = After Termination | M = Months  |     |
|  |   | C = Current Only       | P = Permanent                                     |     |
|  |   | EOM = End of Month     | S = Until <del>Superseded</del> <u>Superseded</u> |     |
|  |   | EOY = End of Year      | V = Vital   |     |

## Jefferson County Records Retention Schedule

Department: Human Services - Senior Services

Revised:  
10/11/2016~~3/2008~~

| Record Title   | State Code | Authority      | <b>Retention Period (Years are in addition to Current Year) Retention Years—Plus Current Year</b> | Official Copy |
|--|------------|----------------|---|---------------|
| Grant Applications   | W          |                | 3   | YES           |
| Home Delivered Meals C202 Sheets   | W          |                | 7   | YES           |
| Home Delivery Meals Client Change Log, Daily Activity Log & Daily Vendor Order Sheet * | W          |                | 7   | YES           |
| <u>Daily Activity Reports and Daily Schedules, Other</u>                               | <u>W</u>   |                | <u>7</u>  |               |
| Home Delivered Meals Monthly Computer Printout Reports                                 | W          |                | 3   | YES           |
| Home Delivered Meals Volunteer Mileage Reports   | W          | WI Stats 46.85 | 3   | YES           |
| Home Delivered Meals Database  | W          | WI Stats 46.85 | 7   | YES           |
| Information & Assistance (I&A) Files (EOY)   | W          |                | 7   |               |

|  |   |                        |   |     |
|--|---|------------------------|---|-----|
| Information & Assistance Phone Logs  | W |                        | 7   | YES |
| Long Term Redesign Project   | W |                        | C   | YES |
| Nutrition Screening Tool   | W |                        | 3   | YES |
| Nutrition Site Registrations <u>and Rosters</u> *  | W |                        | <del>13</del>                                     | YES |
| Nutrition Site Progress Reports *  | W |                        | 1   |     |
| Nutrition Program Records  | W |                        | 3   | YES |
| Nutrition Quality Site Control Sheets *  | W |                        | 3   | YES |
| Nutrition Site Progress Reports *  | W |                        | 3   | YES |
| <b>Historical Society Codes</b>  |   | <b>Retention Codes</b> |   |     |
| N = Notify    W = Waived    NA = Not Applicable  |   | AA = After Audit       | EVT = Event Date                                  |     |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |   | AS = After Settlement  | LOP = Life of Product                             |     |
|  |   | AT = After Termination | M = Months  |     |
|  |   | C = Current Only       | P = Permanent                                     |     |
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|  |   | EOY = End of Year      | V = Vital   |     |

## Jefferson County Records Retention Schedule

Department: Human Services - Senior Services

Revised:  
10/11/2016/~~3/2008~~

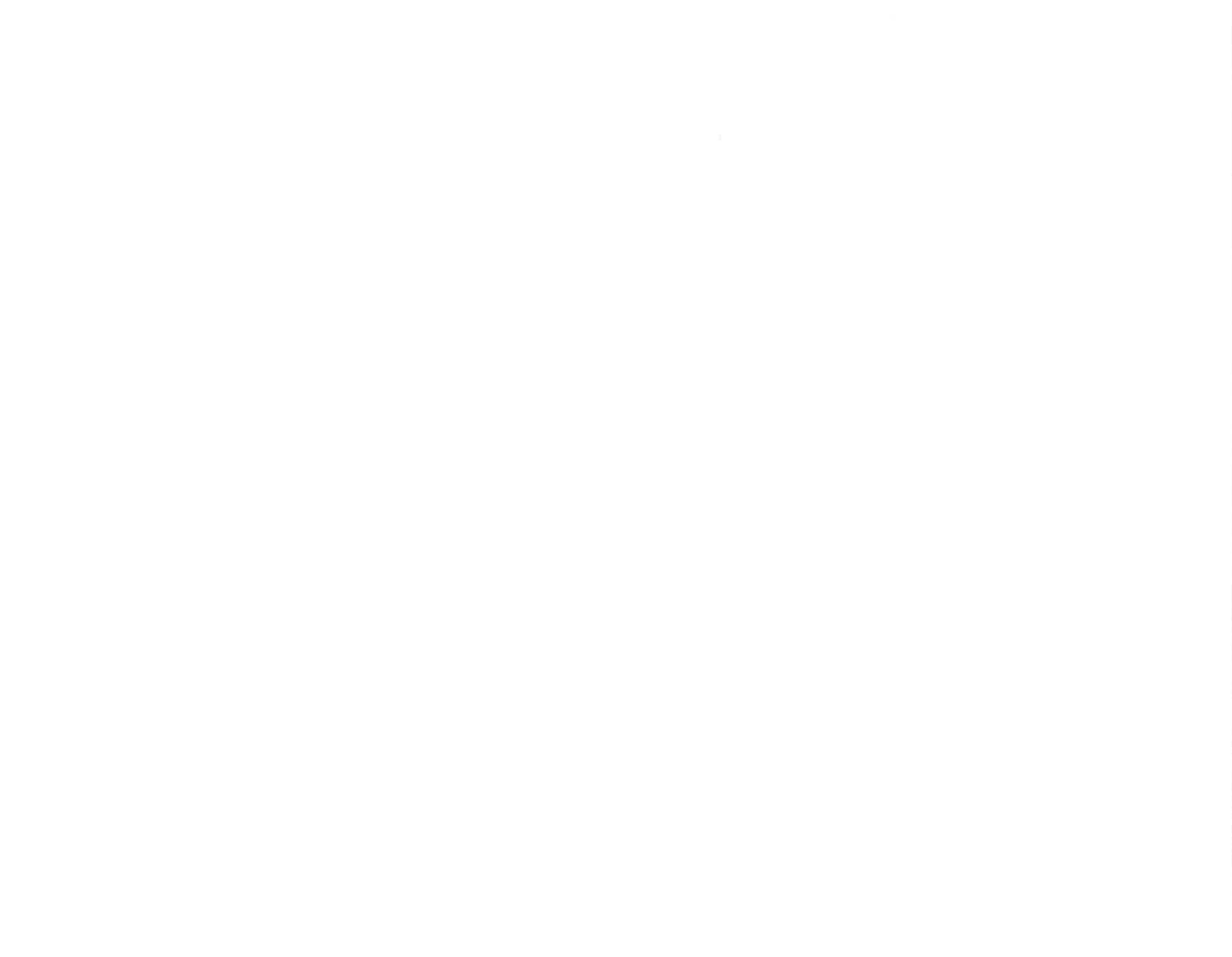
| Record Title  | State Code | Authority      | <u>Retention Period</u><br><u>(Years are in addition to Current Year)</u><br><del>Retention Years</del><br><del>-Plus Current Year</del> | Official Copy |
|---|------------|----------------|--|---------------|
| Reports, Specialized Transportation / Other                                 | W          |                | 5  | YES           |
| Senior Dining Quality Control Sheets *                                      | W          |                | 7  | YES           |
| Shared Taxi Program Monthly Report  | W          |                | C  | YES           |
| Statistics, Operational and Cost  | W          |                | 5  | YES           |
| Transit Data, Historical, Specialized                                       | W          | WI Stats 85.21 | 7AS  | YES           |
| Volunteer Acknowledgment of Confidentiality                                 | W          |                | 3AT  | YES           |
| Volunteer Card File   | W          | WI Stats 46.85 | 7  | YES           |
| Volunteer Driver Agreements   | W          |                | 3AT  | YES           |
| Volunteer Registration Forms - Includes Confidentiality Driver's Statements | W          |                | 7  | YES           |

| Historical Society Codes   | Retention Codes        |   |
|--|------------------------|---|
| N = Notify      W = Waived      NA = Not Applicable  | AA = After Audit       | EVT = Event Date                                  |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> | AS = After Settlement  | LOP = Life of Product                             |
|  | AT = After Termination | M = Months  |
|  | C = Current Only       | P = Permanent                                     |
|  | EOM = End of Month     | S = Until <del>Superseded</del> <u>Superseded</u> |
|  | EOY = End of Year      | V = Vital   |

## Jefferson County Records Retention Schedule

**Department:** Human Services - ~~Workforce Devt~~ Economic Support **Revised:** 10/11/2016 ~~3/2008~~

| Record Title   | State Code | Authority                                    | <u>Retention Period</u><br>(Years are in addition to Current Year)<br><del>Retention Years</del><br><b>-Plus Current Year</b> | Official Copy |
|--|------------|--|---|---------------|
| Income Maintenance Case Records  | W          | WI Stats 49 & 59.52(4)(a)18, HSS245.03(1)(a) | 4   | YES           |
| Returned Tax Intercept Notices   | W          |  | 7   |               |
| Tax Intercept  | W          |  | 7   |               |
| Tax Intercept (Computer Printout)  | W          |  | 7   |               |
| Historical Society Codes   |            | Retention Codes                              |   |               |
| N = Notify      W = Waived      NA = Not Applicable  |            | AA = After Audit                             | EVT = Event Date  |               |
| <b>IMPORTANT NOTE:</b> The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.). |            | AS = After Settlement                        | LOP = Life of Product   |               |
|  |            | AT = After Termination                       | M = Months  |               |
|  |            | C = Current Only                             | P = Permanent   |               |
|  |            | EOM = End of Month                           | S = Until <del>Superseded</del> <u>Superseded</u>   |               |
|  |            | EOY = End of Year                            | V = Vital   |               |



## Jefferson County Records Retention Schedule

Department: Land Information and Surveyor Revised: 10/11/20164/2008

| Record Title                          | State Code | Authority                                       | <u>Retention Period</u><br>(Years are in addition to<br>Current Year)<br><del>Retention Years</del><br>Plus Current Year | Official Copy |
|---------------------------------------|------------|---|--|---------------|
| Accident Reports, Employee            | W          |   | 7 AT   |               |
| Address Assignments                   | <u>N</u>   | Jefferson County Uniform<br>Numbering Ordinance | P  | YES           |
| Aerial Photographs                    | <u>N</u>   |   | P  |               |
| Assessment & Tax Role Manufacturing   | <u>N</u>   |   | 2  |               |
| Board of Review Changes               | <u>N</u>   |   | 5  | YES           |
| Cadastral Maps                        | <u>N</u>   |   | P  | YES           |
| Corner Tie Sheets                     | <u>N</u>   |   | P  | YES           |
| Employee Emergency Informational Form | <u>N</u>   |   | S  |               |
| Field Notes                           | <u>N</u>   |   | P  | YES           |
| Grants                                | <u>N</u>   |   | 10   |               |

|   |          |   |           |     |
|---|----------|---|-----------|-----|
| High Precision Geodetic Control Network | <u>N</u> |   | S         | YES |
| Land Information Plan, Jefferson County | <u>N</u> |   | P         | YES |
| Managed Forest Land Index               | <u>N</u> | WI Stats 77.16 (3), (7), (9)                    | 5         |     |
| Map Projects - Special                  | <u>N</u> |   | S         | YES |
| Map - Official Jefferson County         | <u>N</u> |   | S         | YES |
| Maps - Highway Relocation               | <u>N</u> |   | P         |     |
| Maps - Railroad                         | <u>N</u> |   | S         |     |
| Maps - Town Address                     | <u>N</u> | Jefferson County Uniform<br>Numbering Ordinance | <u>PS</u> | YES |
| Mill Rate Worksheets                    | <u>N</u> |   | 5         | YES |
| Parcel Mapping Documentation            | <u>N</u> |   | 10        | YES |
| Payment Voucher                         | W        |   | 7         |     |
| Personnel, Seasonal Interns             | W        |   | 7 AT      |     |
| Plat Books                              | <u>N</u> |   | P         | YES |
| Plat of Surveys                         | N/A      | WI Stats 59.43(1)                               | P         | YES |

|  |          |   |   |     |
|--|----------|---|---|-----|
| Project, Capital Summaries   | W        |   | C |     |
| Receipts, Daily  | W        |   | 7 | YES |
| Receipts, Refunds  | W        |   | 1 | YES |
| Reports, Financial   | W        |   | 3 |     |
| Street Atlas   | N/A      |   | P | YES |
| Statement of Assessments   | <u>N</u> |   | 5 |     |
| Surveys for County Departments   | <u>N</u> |   | P | YES |
| Wisconsin Land Technical Publications  | <u>N</u> |   | S |     |
| <b>Historical Society Codes</b>  |          | <b>Retention Codes</b>  |   |     |
| N = Notify      W = Waived      NA = Not Applicable  |          | AA = After Audit                      EVT = Event Date                                    |   |     |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |          | AS = After Settlement                      LOP = Life of Product                          |   |     |
|  |          | AT = After Termination                      M = Months                                    |   |     |
|  |          | C = Current Only                              P = Permanent                               |   |     |
|  |          | EOM = End of Month                      S = Until <del>Superceded</del> <u>Superseded</u> |   |     |
|  |          | EOY = End of Year                              V = Vital                                  |   |     |



## Jefferson County Records Retention Schedule

Department: Land & Water Conservation

Revised: 10/11/20164/2008

| Record Title                                   | State Code | Authority                           | <u>Retention Period (Years are in addition to Current Year)</u><br><del>Retention Years-- Plus Current Year</del> | Official Copy |
|--|------------|-------------------------------------|---|---------------|
| Aerial Photos (black & white prints)           | W          |                                     | P   |               |
| Agriculture Compliance Inventory and Data Base |            |                                     | P   |               |
| Agriculture Land Preservation Plan             | N          |                                     | S   | YES           |
| Animal Livestock Inventory                     |            |                                     | 7   | YES           |
| Animal Livestock Siting                        |            |                                     | 7   | YES           |
| Burial Sites in Waukesha County                | N/A        |                                     | P   |               |
| Conservation Reserve Program Records           | W          | 120-GM, Amend. 46, 408-150, 300 (2) | 13  | YES           |
| Cost Sharing Agreement Records                 | W          | NR120ATCP50                         | 3AT   | YES           |
| Cost Sharing Grants (Part of VT4006)           |            |                                     | 3AT   |               |
| County Mining Contracts                        |            |                                     | P   |               |

|  |           |                                       |     |     |
|--|-----------|---------------------------------------|-----|-----|
| Detailed Design Drawings (Land & Water Conservation Designs) | W         |                                       | P   | YES |
| Drainage District Files                                      | <u>NA</u> |                                       | P   |     |
| Equipment Maintenance  | <u>NA</u> |                                       | 7   | YES |
| Farm Conservation Plans *                                    | W         | 120-GM,408-98, SCS/CRS-29 and 31, (a) | P   | YES |
| Farmland Preservation Certificates *                         | W         |                                       | 7   |     |
| Farmland Preservation Program Records                        | N         |                                       | 7   | YES |
| Grants   | <u>NA</u> |                                       | 7   |     |
| Interdepartmental Agreements                                 | <u>NA</u> |                                       | S   |     |
| Land and Water Resource Management Plan (LWRM)               | <u>NA</u> |                                       | P   |     |
| Land Conservation Grants                                     | <u>NA</u> |                                       | 7   |     |
| Maps - Townships   | N/A       |                                       | P   | YES |
| <del>Manure</del> Manure Storage Permits                     | <u>NA</u> |                                       | 7   | YES |
| Memoranda of Understanding                                   | <u>NA</u> |                                       | 7AT | YES |
| Non-metallic Mining Permit Files                             | <u>NA</u> |                                       | P   |     |

|  |           |   |   |     |
|--|-----------|---|---|-----|
| Soil Interpretation Records (SIRS)   | W         |   | S | YES |
| Soil Stewardship   | <u>NA</u> |   | 7 | YES |
| Soil Transect Survey   | <u>NA</u> |   | 7 | YES |
| Tree Seedling Sale   | <u>NA</u> |   | 7 | YES |
| USDA (U.S. Department of Agriculture) Receipts & Expense Documentation   | W         |   | 3 |     |
| Watershed Control Plan Projects  | W         |   | 7 |     |
| Wetland Maps   | N/A       |   | P |     |
| <b>Historical Society Codes</b>  |           | <b>Retention Codes</b>  |   |     |
| N = Notify      W = Waived      NA = Not Applicable  |           | AA = After Audit      EVT = Event Date                                    |   |     |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |           | AS = After Settlement      LOP = Life of Product                          |   |     |
|  |           | AT = After Termination      M = Months                                    |   |     |
|  |           | C = Current Only      P = Permanent                                       |   |     |
|  |           | EOM = End of Month      S = Until <del>Superceded</del> <u>Superseded</u> |   |     |
|  |           | EOY = End of Year      V = Vital  |   |     |



## Jefferson County Records Retention Schedule

Department: Coroner Medical Examiner

Revised: 10/11/2016/2008

| Record Title                                  | State Code     | Authority | <u>Retention Period</u><br>(Years are in addition to<br><u>Current Year</u> )<br><del>Retention Years -</del><br><del>Plus Current Year</del> | Official Copy  |
|---|----------------|-----------|---|----------------|
| Case Billing                                  | N/A            |           | 10  | YES            |
| <del>Case Face Sheet Logs</del>               | <del>N/A</del> |           | <del>P</del>  | <del>YES</del> |
| Case Files                                    | W              |           | 75  | YES            |
| Case File Slides                              | W              |           | 75  | YES            |
| Case File X-rays                              | W              |           | 75  | YES            |
| <del>Case Index, Monthly (digital)</del>      | <del>W</del>   |           | <del>5</del>  | <del>YES</del> |
| Case Photos and DNA Card                      | N/A            |           | 75  |                |
| Cremation Case Files                          | N/A            |           | P   |                |
| <u>Coroner Medical Examiner</u> Annual Report | W              |           | P   | YES            |
| <u>Medical Examiner Autopsy Report</u>        | <u>N/A</u>     |           | <u>P</u>  | <u>YES</u>     |

| <u>Medical Examiner Investigative Report</u>   | <u>NA</u> |  | <u>P</u> | <u>YES</u> |
|--|-----------|--|----------|------------|
| <u>Medical Examiner Toxicology Report</u>  | <u>NA</u> |  | <u>P</u> |            |
| <u>Inventory – Equipment</u>   |           |  | <u>S</u> | <u>YES</u> |
| Medication Disposal Log  | N/A       |  | 10       | YES        |
| Report for Final Disposition <u>(Other reportable)</u>   | <u>W</u>  |  | 3        |            |
| <u>WCMEA-Materials</u>   |           |  | <u>S</u> |            |
| Historical Society Codes   |           | Retention Codes  |          |            |
| N = Notify      W = Waived      NA = Not Applicable  |           | AA = After Audit                      EVT = Event Date<br>AS = After Settlement                LOP = Life of Product<br>AT = After Termination                M = Months<br>C = Current Only                        P = Permanent<br>EOM = End of Month                    S = Until <del>Supereeded</del> <u>Superseded</u><br>EOY = End of Year                        V = Vital |          |            |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |           |  |          |            |

## Jefferson County Records Retention Schedule

Department: Management Information Systems

Revised:  
10/11/2016/3/2008

| Record Title                          | State Code | Authority | <u>Retention Period</u><br>(Years are in addition to<br>Current Year)<br><del>Retention Years</del> <b>Plus Current Year</b> | Official Copy  |
|---------------------------------------|------------|-----------|--|----------------|
| Fiber Network Diagram                 | <u>NA</u>  |           | C  | Yes            |
| Network Diagram                       | <u>NA</u>  |           | C  | Yes            |
| Backup Procedures                     | <u>NA</u>  |           | C  | Yes            |
| <del>Class Schedule</del>             |            |           | C  | <del>Yes</del> |
| <del>Contractor Recommendations</del> |            |           | 7  | <del>Yes</del> |
| Contract Correspondence               | <u>NA</u>  |           | 7  | Yes            |
| <del>Course Evaluations</del>         |            |           | C+1  | <del>Yes</del> |
| Customer Satisfaction Survey          | <u>NA</u>  |           | 1  | Yes            |
| <del>Job Responsibility List</del>    |            |           | C  | <del>Yes</del> |
| Computer Inventory                    | <u>NA</u>  |           | C  | Yes            |

|  |           |   |            |     |
|--|-----------|---|------------|-----|
| <b>Written Backup Log</b>  |           |   | 7          | Yes |
| <b>Backup (Imaging, Email, Misys, ECS, Home drive, Network shared, departmental, Network sheared, county-wide, Jeffdc1, Jeffdc2, Firewall, Wisacwis, CHEMS, All others not stated)</b> | <u>NA</u> |   | 73         | Yes |
| <b>Backup (Jeffutil, Jeffutil2, Web server, Employee web page, Jeff-avotus/sql (telephone records), Switch backup)</b>   |           |   | 4          | Yes |
| <b>Backup Voicemail (Voicemail, Phone system, Outlook web access, Security camera images)</b>  | <u>NA</u> |   | 30-15 days | Yes |
| <b>AS400 Backups</b>   |           |   |            |     |
| <b>Quarterly</b>   | <u>NA</u> |   | 5          | Yes |
| <b>Daily</b>   | <u>NA</u> |   | 60 days    | Yes |
| <b>Data Bases</b>  | -         | - |            |     |
| <b>-MySQL</b>  |           |   | 60 days    | Yes |
| <b>-DB2</b>  |           |   | 60 days    | Yes |
| <b>-Access</b>   |           |   | 60 days    | Yes |
| <b>-Oracle Light</b>   |           |   | 60 days    | Yes |
| <b>PC Ghost Images</b>   |           |   | 6          | Yes |
| <b>Software Licensing List</b>   |           |   | 7          | Yes |

|  |           |  |              |                |
|--|-----------|--|--------------|----------------|
| MIS Disaster Recovery Plan                     | <u>NA</u> |  | C            | Yes            |
| HIPAA Security Enterprise Assessment           | <u>NA</u> |  | C            | Yes            |
| MIS Security Procedures                        | <u>NA</u> |  | C            | Yes            |
| MIS Security Audits                            | <u>NA</u> |  | 7            | Yes            |
| <del>General Security-computer generated</del> |           |  | <del>7</del> | <del>Yes</del> |
| Software Licenses                              | <u>NA</u> |  | LOP +3       | Yes            |
| <del>Check-out</del>                           |           |  | <del>2</del> | <del>Yes</del> |
| <del>Station ID list</del>                     |           |  | <del>C</del> | <del>Yes</del> |
| Pre-installation forms                         | <u>NA</u> |  | 90 days      | Yes            |
| <del>PC database</del>                         |           |  | <del>C</del> | <del>Yes</del> |
| Security Incident Review                       | <u>NA</u> |  | 7            | Yes            |
| <del>Written price quotes</del>                |           |  | <del>7</del> | <del>Yes</del> |
| Maintenance contracts                          | <u>NA</u> |  | LOP          | Yes            |
| Software contracts                             | <u>NA</u> |  | LOP          | Yes            |

|  |           |  |          |            |
|--|-----------|--|----------|------------|
| <u>Email</u>   | <u>NA</u> |  | <u>3</u> | <u>Yes</u> |
| <u>Continuity of Operations</u>  | <u>NA</u> |  | <u>C</u> | <u>Yes</u> |
| <b>Historical Society Codes</b>  |           | <b>Retention Codes</b>   |          |            |
| N = Notify    W = Waived    NA = Not Applicable  |           | AA = After Audit                      EVT = Event Date<br>AS = After Settlement                LOP = Life of Product<br>AT = After Termination               M = Months<br>C = Current Only                        P = Permanent<br>EOM = End of Month                  S = Until Superseded<br>EOY = End of Year                      V = Vital |          |            |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |           |  |          |            |

## Jefferson County Records Retention Schedule

Department: Parks

Revised:  
10/11/20163/2008

| Record Title                | State Code | Authority                   | Retention Period<br><small>(Years are in addition to Current Year)</small><br><del>Retention Years</del><br><del>Plus Current Year</del> | Official Copy |
|-----------------------------|------------|-----------------------------|--|---------------|
| Acquisitions, Land          | W          |                             | LOP  |               |
| Advertising, By Facility    | W          |                             | 3  | YES           |
| Advertising, By Media       | W          |                             | 3  | YES           |
| Automobile Accident Reports | W          |                             | 7  |               |
| Bids, Successful            | W          | WI Stats 59.52 (4) (a) (10) | 7 AT   | YES           |
| Bids, Unsuccessful          | W          |                             | 4  | YES           |
| Blueprints                  | W          |                             | LOP  | YES           |
| Capital Project Plans       | W          |                             | 7  | YES           |
| Maps                        | W          |                             | S  |               |

|  |   |                        |                       |     |
|--|---|------------------------|-----------------------|-----|
| Emergency Information, Seasonal Employees  | W |                        | C                     |     |
| Equipment Maintenance Log  | W |                        | LOP                   | YES |
| Events and Programs  | N |                        | 3                     | YES |
| Expenditures, Seasonal Employees   | W |                        | 3                     |     |
| Facility Reservations  | W |                        | Evt + 7               | YES |
| Grant, Funding   | W |                        | LOP                   |     |
| <b>Historical Society Codes</b>  |   | <b>Retention Codes</b> |                       |     |
| N = Notify      W = Waived      NA = Not Applicable  |   | AA = After Audit       | EVT = Event Date      |     |
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|  |   | AT = After Termination | M = Months            |     |
|  |   | C = Current Only       | P = Permanent         |     |
|  |   | EOM = End of Month     | S = Until Superseded  |     |
|  |   | EOY = End of Year      | V = Vital             |     |

## Jefferson County Records Retention Schedule

**Department:** Parks

**Revised:**  
10/11/2016~~3/2008~~

| Record Title                     | State Code | Authority                                   | <b>Retention Period</b><br><i>(Years are in addition to Current Year)</i><br><b>Retention Years - Plus Current Year</b> | Official Copy |
|----------------------------------|------------|---|---|---------------|
| Incident Reports                 | W          |   | 7   |               |
| Injury Report Packets (Employee) | W          |   | 7 AT  |               |
| Injury Reports (Non-Employee)    | W          |   | 7   |               |
| Inventory, Small Tools           | W          |   | LOP   |               |
| Log, Miscellaneous Fees          | W          |   | 3   |               |
| Log, Chemical Applications       | W          |   | 7   | YES           |
| Log, Fleet Maintenance           | W          |   | 3   |               |
| Log, Gasoline Consumption        | W          | Department of Revenue -<br>MF-003 (R 10-97) | 4   | YES           |
| Log, Maintenance / Patrol Trails | W          |   | 7   | YES           |

|  |          |                        |                       |            |
|--|----------|------------------------|-----------------------|------------|
| <b>Log, Well Data</b>  | <b>W</b> |                        | <b>LOP</b>            | <b>YES</b> |
| <b>Park and Open Space Master Plan</b>   | <b>N</b> |                        | <b>P</b>              | <b>YES</b> |
| <b>Park System Work Logs</b>   | <b>W</b> |                        | <b>3</b>              | <b>YES</b> |
| <b>Park Ordinance Citations</b>  | <b>W</b> |                        | <b>6</b>              | <b>YES</b> |
| <b>Permits - Shelter rental</b>  | <b>W</b> |                        | <b>3</b>              | <b>YES</b> |
| <b>Plans / Construction Documents / Specifications / As Built / Drawings</b>   | <b>W</b> |                        | <b>LOP</b>            | <b>YES</b> |
| <b>Historical Society Codes</b>  |          | <b>Retention Codes</b> |                       |            |
| N = Notify    W = Waived    NA = Not Applicable  |          | AA = After Audit       | EVT = Event Date      |            |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |          | AS = After Settlement  | LOP = Life of Product |            |
|  |          | AT = After Termination | M = Months            |            |
|  |          | C = Current Only       | P = Permanent         |            |
|  |          | EOM = End of Month     | S = Until Superseded  |            |
|  |          | EOY = End of Year      | V = Vital             |            |

## Jefferson County Records Retention Schedule

**Department:** Parks

**Revised:**  
10/11/2016/2008

| Record Title                      | State Code | Authority | <u>Retention Period</u><br>(Years are in addition to Current Year)<br><del>Retention Years</del><br>- Plus Current Year | Official Copy |
|-----------------------------------|------------|-----------|---|---------------|
| Publicity "Parks News" Newsletter | <u>NA</u>  |           | 3   |               |
| Safety Inspection Report          | W          |           | 7   |               |
| Schedules, Projects               | W          |           | 3   | YES           |
| Site Plans                        | W          |           | LOP   | YES           |
| Surveys / Questionnaires          | W          |           | 3   | YES           |
| Tickets, Dog Park Tickets, Daily  | W          |           | 3   | YES           |
| Volunteer Information             | <u>NA</u>  |           | 3   |               |

### Historical Society Codes

N = Notify      W = Waived      NA = Not Applicable

**IMPORTANT NOTE: The retention periods**

### Retention Codes

AA = After Audit

EVT = Event Date

AS = After Settlement

LOP = Life of Product

on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).

AT = After Termination

M = Months

C = Current Only

P = Permanent

EOM = End of Month

S = Until Superseded

EOY = End of Year

V = Vital

## Jefferson County Records Retention Schedule

**Department:** Parks - Administration

**Revised:**  
10/11/2016/2008

| Record Title   | State Code | Authority              | <u>Retention Period</u><br>(Years are in addition to Current Year)<br><del>Retention Years</del><br>-Plus Current Year | Official Copy |
|--|------------|------------------------|--|---------------|
| Analysis, Park System, Financial   | W          |                        | S  |               |
| Employee Emergency Informational Form  | <u>NA</u>  |                        | S  |               |
| Log, Blanket Purchase Orders   | W          |                        | 3 AT   | YES           |
| Water/Well/Septic Preliminary Site Evaluation (PSE) Collection Reports   | W          |                        | 5  | YES           |
| Historical Society Codes   |            | Retention Codes        |  |               |
| N = Notify      W = Waived      NA = Not Applicable  |            | AA = After Audit       | EVT = Event Date   |               |
| <b>IMPORTANT NOTE:</b> The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.). |            | AS = After Settlement  | LOP = Life of Product  |               |
|  |            | AT = After Termination | M = Months   |               |
|  |            | C = Current Only       | P = Permanent  |               |
|  |            | EOM = End of Month     | S = Until Superseded   |               |
|  |            | EOY = End of Year      | V = Vital  |               |



Jefferson County Records Retention Schedule

Department: Planning & Zoning ~~& Planning~~ Revised: 10/11/2016~~3/2008~~

| Record Title.  | State Code | Authority    | <b>Retention Period (Years are in addition to Current Year) Retention Years— Plus Current Year</b> | Official Copy |
|--|------------|--------------|--|---------------|
| Agriculture Land Preservation Plan   | N          |              | S  | YES           |
| Amendments to the <del>Jefferson</del> <u>Waukesha</u> County Development Plan | <u>N</u>   |              | P  | YES           |
| Conditional Use Files  | N/A        |              | P  | YES           |
| Farmland Preservation Certificates   | <u>NA</u>  | WI. Stat. 91 | P  | YES           |
| FEMA Flood Evaluation Certificates   | <u>NA</u>  |              | P  | YES           |
| Floodplain Ordinance   | <u>NA</u>  |              | S  | YES           |
| Floodplain Substantial Damage  | <u>NA</u>  |              | P  | YES           |
| Land Use Permit Files  | <u>NA</u>  |              | P  | YES           |
| Private Sewage Systems   | <u>NA</u>  |              | P  | YES           |
| Private Sewage System Maintenance  | <u>NA</u>  | COMM 83      | P  | YES           |
| Private Sewage System Ordinance  | <u>NA</u>  |              |  |               |

|  |     |                        |                       |     |
|--|-----|------------------------|-----------------------|-----|
| Soil Test  | NA  |                        | P                     | YES |
| Subdivision Review   | N/A |                        | P                     | YES |
| Subdivision & Land Ordinance   | NA  |                        | S                     | YES |
| Violation Files  | N/A |                        | P                     | YES |
| Historical Society Codes   |     | Retention Codes        |                       |     |
| N = Notify W = Waived NA = Not Applicable  |     | AA = After Audit       | EVT = Event Date      |     |
| <b>IMPORTANT NOTE:</b> The retention periods on this schedule apply to records stored on any medium (paper; electronically, digitally, microform, etc.). * |     | AS = After Settlement  | LOP = Life of Product |     |
|  |     | AT = After Termination | M = Months            |     |
|  |     | C = Current Only       | P = Permanent         |     |
|  |     | EOM = End of Month     | S = Until Superseded  |     |
|  |     | EOP = End of Year      | Y = Year              |     |

## Jefferson County Records Retention Schedule

Department: Register in Probate

Revised: 10/11/2016/2008

| Record Title                                    | State Code | Authority      | <u>Retention Period</u><br>(Years are in addition to<br>Current Year)Retention<br>Years -- Plus Current<br>Year | Official Copy |
|---|------------|----------------|---|---------------|
| Adoptions                                       | N/A        | SCR 72.01 (42) | P   | YES           |
| Case File, Termination Parental Rights/Adoption | W          | SCR 72.01 (42) | P   | YES           |
| Court Reporter Notes                            | W          | SCR 72.01 (47) | 10  | YES           |
| Estate Case Files                               | N          | SCR 72.01 (29) | 75  | YES           |
| Guardianship Case & Protective Placement Files  | W          | SCR 72.01 (32) | 7   | YES           |
| Guardianship Court Record Cards                 | W          | SCR 72.01 (33) | 7   | YES           |
| Guardianship Minute Record                      | W          | SCR 72.01 (34) | 7   | YES           |
| Mental Health Case File                         | W          | SCR 72.01 (38) | 10  | YES           |
| Mental Health Court Record Cards                | W          | SCR 72.01 (39) | 10  | YES           |
| Mental Health Minute Record                     | W          | SCR 72.01 (40) | 10  | YES           |

|  |   |  |     |     |
|--|---|--|-----|-----|
| Probate Court Record Cards   | N | SCR 72.01 (29, 30, 50)   | 75  | YES |
| Probate Minute Record  | W | SCR 72.01 (31)   | 75  | YES |
| Protective Placement Files   | W | SCR 72.01 (33)   | 7   | YES |
| Receipts, Accounts Payable   | W | SCR 72.01 (48)   | 7   | YES |
| Registry of Wills  | N | SCR 72.01 (37)   | 100 | YES |
| Trust Account Ledger   | W | SCR 72.01 (50)   | 75  | YES |
| Wills Deposited for Safe-keeping   | N | SCR 72.01 (35)   | 100 | YES |
| Wills, Not Admitted to Probate   | N | SCR 72.01 (36)   | 100 | YES |
| <b>Historical Society Codes</b>  |   | <b>Retention Codes</b>   |     |     |
| N = Notify      W = Waived      NA = Not Applicable  |   | AA = After Audit      EVT = Event Date                             |     |     |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |   | AS = After Settlement      LOP = Life of Product                   |     |     |
|  |   | AT = After Termination      M = Months                             |     |     |
|  |   | C = Current Only      P = Permanent                                |     |     |
|  |   | EOM = End of Month      S = Until Superseded <del>Superseded</del> |     |     |
|  |   | EOY = End of Year      V = Vital                                   |     |     |

## Jefferson County Records Retention Schedule

**Department:** Register of Deeds (From SHSW Schedule)

**Revised:** ~~10/11/2016~~13/2016

| Record Title   | State Code | Authority              | <u>Retention Period</u><br><u>(Years are in addition to</u><br><u>Current Year)</u><br><del>Retention Years--</del><br><del>Plus Current Year</del> | Official Copy |
|--|------------|------------------------|---|---------------|
| Annulment, divorce or legal separation judgment which affects title to real estate or liability for payment of support or maintenance  | N/A        | s. 767.255, 767.40 (2) | P   | YES           |
| 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 | N/A        | s. 786.25 (3)          | P   | YES           |
| Armed forces: registration of all county persons who died in the services of the U.S. armed forces   | N/A        | s. 45.35 (a)           | P   | YES           |
| Articles of incorporation and amendments for mutual associations   | N/A        | s. 215.71 (3)          | P   | YES           |
| Articles of incorporation for capital stock associations and amendments  | N/A        | s. 215.61 (3)          | P   | YES           |
| Articles of incorporation for banking corporation and amendments   | N/A        | s. 221.03 (3)          | P   | YES           |

|   |     |  |   |     |
|---|-----|--|---|-----|
| 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 | N/A | s. 891.20                                | P | YES |
| Assessors' plats and amendments   | N/A | s. 70.27 (2)(8)                          | P | YES |
| Authorization to execute conveyances on behalf of a private corporation   | N/A | s. 706.03 (3)                            | P | YES |
| Bulkhead line, establishment of or reestablishment of an existing bulkhead line along shore of navigable waters: map, description and ordinance   | N/A | s. 30.11 (3)                             | P | YES |
| Business partnership agreements, amendments, articles of dissolution  | N/A | s. 178.39                                | P | YES |
| Cemetery association (non-profit) certification resolutions and copy of proceedings   | N/A | s. 157.062 (9)                           | P | YES |
| Cemetery plat or map, records: order authorizing the vacating or replatting of the lands, record of a cataloged burial site   | N/A | s. 157.07 (1). 157.07 (5), 157.70 (2)(i) | P | YES |
| Census schedules  | N/A | None                                     | P | YES |
| Certificate of authorization to exercise fiduciary powers   | N/A | s. 221.04 (6)                            | P | YES |
| 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.   | N/A | s. 215.58 (3)                            | P | YES |
| Certificate reorganizing a mutual association as a mutual savings and loan holding company  | N/A | s. 215.59 (1)(g)                         | P | YES |
| Certificates of conversion from a mutual  | N/A | s. 214.685 (5)                           | P | YES |

|   |            |                            |          |            |
|---|------------|----------------------------|----------|------------|
| savings bank to a stock savings bank    |            |                            |          |            |
| Certified survey map and corrections of | <b>N/A</b> | s. 236.34 (1), 236.295 (1) | <b>P</b> | <b>YES</b> |
| Chattel mortgages                       | <b>N/A</b> | None                       | <b>P</b> | <b>YES</b> |

|   |     |   |   |     |
|---|-----|---|---|-----|
| City condemnation and acquisition of property by cities, including report and plan of improvement, common council resolutions related to property   | N/A | s. 32.55 (3), 32.56 (2), 32.57 (7)(b)                           | P | YES |
| City: certificate showing that a city has established an official map   | N/A | s. 62.23 (6)(b)   | P | YES |
| Condominium instruments: declaration, plats, and plans of a condominium and attached exhibits or schedules  | N/A | s. 703.07 (1)   | P | YES |
| Contracts: credit sale of alcoholic dispensing equipment, share croppers  | N/A | s. 125 (33)(2)(e), 241.03 (1)                                   | P | YES |
| Conveyance and instrument affecting title to land in this state and index   | N/A | s. 706.05 (1), 706.05 (7)                                       | P | YES |
| Cooperatives: incorporation articles; contract between cooperative association and members terminations; weekly listing of all documents concerning cooperatives filed and recorded by secretary of state | N/A | s. 185.05 (3), 185.42 (1), 185.42 (2)(5), 185.82 (3)            | P | YES |
| Corporate name: record of those using name, amendments, discontinuance  | N/A | s. 134.17 (1)   | P | YES |
| Corporations (miscellaneous non-profit): fraternal societies, VFW posts and affiliates  | N/A | s. 188.06, 188.11 (1)   | P | YES |
| 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              | N/A | s. 181.32 (1), 181.45 (2), 181.67 (3)(a)                        | P | YES |
| Corporations (religious): certificate of establishment; certificate of consolidation; incorporation articles and amendments; dissolution of corporation   | N/A | s. 187.01 (2), 187.14 (4)(c), 187.16 (1)187.16 (1), 187.19 (10) | P | YES |

|   |            |   |   |            |
|---|------------|---|---|------------|
| Corporations: resolution dissolving domestic corporation  | <b>N/A</b> | s. 182.025 (2)                                    | P | <b>YES</b> |
| 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 | <b>N/A</b> | s. 186.35 (1), 186.02 (3)(a), 186.38 (2), 186.315 | P | <b>YES</b> |
| Daily report regarding system of tract indices or system of chain of title indices as required by county board of supervisors resolution  | <b>N/A</b> | s. 59.43 (12m)(c)                                 | P | <b>YES</b> |
| Declaration of trust for domestic and alien corporations and amendments   | <b>N/A</b> | s. 226.14 (1)                                     | P | <b>YES</b> |
| Deed: certificate of cancelled deed   | <b>N/A</b> | s. 75.23  | P | <b>YES</b> |
| Descent of property, judgement to determine   | <b>N/A</b> | s. 867.05 (4)                                     | P | <b>YES</b> |
| Discharge certificate from U.S. armed forces  | <b>N/A</b> | s. 45.21  | P | <b>YES</b> |
| Drainage district, orders of organization, assessment for costs on drainage lands, order laying out drain   | <b>N/A</b> | s. 88.34 (9), 88.40, 88.94 (5)                    | P | <b>YES</b> |
| Estate transfer by will, intestacy or appointment, disclaimer of  | <b>N/A</b> | s. 853.40 (5)(e)                                  | P | <b>YES</b> |
| Estates: Order settling small estates including those subject to claims of creditors  | <b>N/A</b> | s. 867.01 (3)(h), 867.02 (2)(h)                   | P | <b>YES</b> |
| Estates: statement terminating joint tenancy of life estate   | <b>N/A</b> | s. 867.04, 865.20 (2)                             | P | <b>YES</b> |
| Execution and sale of real estate, certificate of   | <b>N/A</b> | s. 815.38 (1), 59.43 (11)                         | P | <b>YES</b> |
| Exploration mining lease; and cancellation of   | <b>N/A</b> | s. 107.20 (1), 107.25 (2)                         | P | <b>YES</b> |

|   |     |   |   |     |
|---|-----|---|---|-----|
| Farmland preservation agreement and relinquishment  | N/A | s. 91.13 (9), 91.19(5)                        | P | YES |
| Farms or country estates, registration of names   | N/A | s. 59.76(1)                                   | P | YES |
| Federal tax liens and certificates and notices affecting the liens and indexes  | N/A | s. 779.97 (2)(b)                              | P | YES |
| Forest croplands, order of entry, transfer, withdrawal  | N/A | s. 77.02 (3), 77.10 (2)(a) 2                  | P | YES |
| Forest land (managed): Orders regarding   | N/A | s. 77.82 (8), 77.91 (5)                       | P | YES |
| Forest lands (county): order of entry, withdrawals  | N/A | s. 28.11(4)(d)(11)(a)                         | P | YES |
| Grantor/grantee index -- index to real property records   | N/A | s. 59.43(9)                                   | P | YES |
| Highway (controlled access): finding, determination and declaration designating a highway or controlled-access highway; notice of any vacation of a controlled-access highway | N/A | s. 53.027 (1), 84.25, 83.027 (13), 84.25 (13) | P | YES |
| Highway assessments and apportionment on lands for county parks and parkways  | N/A | s. 27.065 (13)(c)                             | P | YES |
| Highway or street maps: map of proposed street or highway for purpose of widening, notice and map for right-of-way, alterations, etc.   | N/A | s. 80.64, 84.295 (10)(a)                      | P | YES |
| Highway register: county  | N/A | s. 83.01 (7)(g)                               | P | YES |
| Ice age trail areas: articles of dedication, amendments, revisions, withdrawal of articles  | N/A | s. 23.293 (15) (f), 23.293 (15) (17)(e)       | P | YES |
| 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                    | N/A | s. 228.05                                     | P | YES |

|  |     |                                    |   |     |
|--|-----|------------------------------------|---|-----|
| Index of records or files kept in the register's office                              | N/A | s. 59.43(10)                       | P | YES |
| Industrial development agencies: articles of incorporation                           | N/A | s. 59.57(2)(e)(2)                  | P | YES |
| Inland lake protection and rehabilitation district, document authorizing creation of | N/A | s. 33.265                          | P | YES |
| Interest in property, statement or certificate confirming                            | N/A | s. 865.201 (2), 867.046 (1)(m)     | P | YES |
| Judgment of declaration of interests in real property                                | N/A | s. 841.10 (1)                      | P | YES |
| Land patents, U.S.   | N/A | None                               | P | YES |
| Levy or writ of execution on real property   | N/A | s. 815.195                         | P | YES |
| Lien for threshing, husking, baling  | N/A | s. 779.50 (3)                      | P | YES |
| Lien judgment  | N/A | s. 75.521 (14)                     | P | YES |
| Lien or mortgage, discharge order  | N/A | s. 847.09                          | P | YES |
| Lien: certificate of redemption of judgment lien on loan                             | N/A | s. 851.64                          | P | YES |
| Liquidated insurer, documents relating to property of                                | N/A | s. 645.46 (17)                     | P | YES |
| Lis pendens  | N/A | s. 840.10 (1), 59.43(11)           | P | YES |
| Marital property agreements and related statements                                   | N/A | s. 766                             | P | YES |
| Metro sewage district boundary: resolution to redefine                               | N/A | s. 66.888 (1)(c)4b, 66.888 (1)(d)3 | P | YES |
| Mineral interests: statement of claim  | N/A | s. 706.057 (4)                     | P | YES |
| Mineral rights register consisting of conveyances of mineral interests               | N/A | s. 706.055                         | P | YES |

|   |     |                                    |   |     |
|---|-----|------------------------------------|---|-----|
| Monuments: survey conducted to erect monuments  | N/A | s. 60.84 (4)                       | P | YES |
| Mortgage liens upon public utilities and satisfaction of mortgage lien  | N/A | s. 66.066 (2)(b)                   | P | YES |
| Mortgage: certificate of discharge after foreclosure  | N/A | s. 846.13                          | P | YES |
| [Mortgage] title: evidence of right of creditor to acquire  | N/A | s. 815.53 (4)                      | P | YES |
| Name change: certified copy of order and indexes  | N/A | s. 786.36                          | P | YES |
| Natural areas heritage program: articles of dedication, amendments, withdrawals                                   | N/A | s. 23.29(16)(18)(f), 23.29 (20)(e) | P | YES |
| Oaths of office   | N/A | s. 19.01 (4) (d)                   | P | YES |
| Plat maps and corrections of  | N/A | s. 236.02 (10), 236.295 (1)        | P | ES  |
| Plat maps: notification to authorities to approve or permitted to object to the final plat that has been recorded | N/A | s. 236.26                          | P | YES |
| Plat maps: resolution of municipality to waive its right to approve plats and resolution to rescind waiver        | N/A | s. 236.10 (5)                      | P | YES |
| Power of attorney   | N/A | s. 813.23 (1)(b)                   | P | YES |
| Probate judgment assigning an interest in real property upon closure of estate                                    | N/A | s. 863.29 (1)                      | P | YES |
| Proof of age (duplicate or certified copy)  | N/A | s. 889.28                          | P | YES |
| Public land: notice of pending application to lay out, widen, or vacate a public place                            | N/A | s. 840.11 (1)840.11 (1)            | P | YES |

|  |     |                  |   |     |
|--|-----|------------------|---|-----|
| 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. | N/A | s. 59.71         | P | YES |
| Public lands: annulment of certificates and patents  | N/A | s. 24.35         | P | YES |
| Rail property: release of first right to acquire by DOT  | N/A | s. 85.09 (5) (b) | P | YES |
| Railroads: map showing proposed route  | N/A | s. 190.10 (1)    | P | YES |
| Railroads: surveyed map and certificate of the alteration or change of routes  | N/A | s. 191.20        | P | YES |
| Real estate liens: payment affidavit for prior liens   | N/A | s. 779.98 (3)    | P | YES |
| Real estate owners subject to building codes   | N/A | s. 62.17 (1)     | P | YES |
| Real estate transfers  | N/A | s. 77.29         | P | YES |
| Real estate: order confirming the sale of real estate of wards or incompetents   | N/A | s. 786.07        | P | YES |
| Real property: affidavit of publication of a sale  | N/A | s. 985.12 (3)    | P | YES |
| Release of power of appointment over legal or equitable interests in real or personal property   | N/A | s. 702.09 (3)(d) | P | YES |
| Rental units: certificates, waivers, stipulations relating to  | N/A | s. 101.122 (6)   | P | YES |
| Retrocession of jurisdiction, documents concerning   | N/A | s. 1.031         | P | YES |
| Savings bank: articles of incorporation of a savings bank and amendments   | N/A | s. 214.25 (5)    | P | YES |
| School district: resolution by two or more school districts to establish an alternative method of governing assets and liabilities   | N/A | s. 66.03 (2c)(b) | P | YES |

|  |     |  |   |     |
|--|-----|--|---|-----|
| 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 | N/A | s. 409.401 (1)(a), 409.402 (1)(b), 409.402 (9), 59.43 (1)(n) | P | YES |
| Security interest upon certificate of title of motor vehicles and boats, memoranda regarding   | N/A | s. 30.572 (4)(5), 342.20 (3)                                 | P | YES |
| Security interests: financing statements, amendments, termination statements, continuation statements, statements of assignment and statements of release                  | N/A | s. 409.404 (1)(a), 409.405 (2), 409.410 (1)                  | P | YES |
| Sewer and transportation facilities, record of damage awards by condemnor  | N/A | s. 32.05(7)(c)   | P | YES |
| Share croppers' contracts  | N/A | s. 241.03 (1)  | P | YES |
| Solar access rights: notice granting permit, notice terminating rights, waiver of rights by permit holder  | N/A | s. 66.032 (6)(b), 66.032 (9)(c), 66.032 (10)                 | P | YES |
| Solid waste disposal facility or a hazardous waste facility: notation of the existence of  | N/A | s. 144.44 (4)(b), 59.43(1)(q)                                | P | YES |
| Surety company bond  | N/A | s. 344.36 (2)  | P | YES |
| Surplus state-owned real property, agreement of transfer   | N/A | s. 16.375 (4)  | P | YES |
| Surveyor's records, field notes  | N/A | None   | P | YES |
| Time-share instrument and amendments; termination agreement  | N/A | s. 707.21 (3), 707.24 (2)(b)                                 | P | YES |
| Town boundary or name change: order or ordinance   | N/A | s. 59.17 (12); 59.23(2)(k)                                   | P | YES |
| Town mutual corporate documents  | N/A | s. 612.81 , 59.43(12)(b)                                     | P | YES |
| Town sanitary districts: order of establishment referendum and resolutions to consolidate districts  | N/A | s. 60.71 (7), 60.785 (2)(a)                                  | P | YES |

|  |     |                                      |              |     |
|--|-----|--------------------------------------|--------------|-----|
| Towns: record of non-compliance with zoning ordinance  | N/A | s. 60.61 (5)b                        | P            | YES |
| Tract index  | N/A | s. 59.43(12m)(a)                     | P            | YES |
| Trademarks, labels, badges, statement or description of  | N/A | s. 132.04                            | P            | YES |
| Trusts: disclaimer of real property or an interest in real property  | N/A | s. 701.27 (5)(e)                     | P            | YES |
| Trusts: letters of trust for a foreign trustee [named in a will]   | N/A | s. 701.16 (1)(d)                     | P            | YES |
| Village: petition for dissolution of a village and election results on question of   | N/A | s. 61.187 (2)                        | P            | YES |
| Village records: Papers, documents and orders relating to the organization and incorporation or the alteration of the boundaries of any village                    | N/A | s. 891.10                            | P            | YES |
| Vital records: certificate of birth, death, divorce or annulment, marriage documents & related data plus indexes   | N/A | s. 69.01(15)(a), 59.43(1)(h)         | P            | YES |
| Woodland tax lands: entry, declassification of; tax law classification   | N/A | s. 77.16 (3)(7)(9)                   | P            | YES |
| 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 | N/A | s. 59.43(11), 811.11, 811.17, 811.22 | P            | YES |
|  |     |                                      |              |     |
| Airport protection plans, specifications, and amendments   | W   | s. 114.135                           | CR + 7 years | YES |
| Applications for certified copies  | W   |                                      | CR + 2 years | YES |
| Cash register tapes  | W   |                                      | CR + 2 years | YES |
| Certificates of old age assistance and indexes   | N   |                                      | CR + 7 years | YES |
| Guardian, petition for appointment of  | W   | s. 880.215                           | CR + 7 years | YES |

|   |          |                                   |   |            |
|---|----------|-----------------------------------|---|------------|
| Municipal redevelopment plan and revisions  | <b>N</b> | s. 66.431 (9)(a)1, 66.431 (11)(b) | CR + 7 years                                      | <b>YES</b> |
| Notice of removal of human corpse   | <b>W</b> |                                   | 2 months from date of death; Dept. H&SS directive | <b>YES</b> |
| Order to suspend proceedings for collection of property taxes of property owned by veterans | <b>W</b> | s. 45.53 (6)                      | CR + 7 years                                      | <b>YES</b> |
| Raze order  | <b>W</b> | s. 66.05 (1)(d)                   | CR + 7 years                                      | <b>YES</b> |
| Report for final disposition of corpse  | <b>W</b> |                                   | 2 years from date of death; Dept. H&SS directive  | <b>YES</b> |
| Treasurers receipts   | <b>W</b> | CR + 2 years                      |   | <b>YES</b> |
| UCC filings (Fixture)409.403 (6)409.402 (5)   | <b>W</b> | s. 409.403 (6), s. 409.402 (5)    | EVT = satisfaction of mortgage                    | <b>YES</b> |
| UCC filings (Non-fixture)   | <b>W</b> | s. 409.403 (3)                    | CR + 5 years                                      | <b>YES</b> |
| UCC - 11, search copies   | <b>W</b> |                                   | CR + 2 years                                      | <b>YES</b> |
| Vital record, request for copy of   | <b>W</b> |                                   | FIS + 1 year                                      | <b>YES</b> |
| Wills, foreign: certificate of assignment   | <b>W</b> | s. 868.05 (2)                     | CR + 7 years                                      | <b>YES</b> |
| Wills, notice that proceedings have been taken to contest the will                          | <b>W</b> | s. 868.01 (3)                     | CR + 7 years                                      | <b>YES</b> |

| <b>Historical Society Codes</b>  |            |                     | <b>Retention Codes</b> |                       |
|--|------------|---------------------|------------------------|-----------------------|
| N = Notify   | W = Waived | NA = Not Applicable | AA = After Audit       | EVT = Event Date      |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |            |                     | AS = After Settlement  | LOP = Life of Product |
|  |            |                     | AT = After Termination | M = Months            |
|  |            |                     | C = Current Only       | P = Permanent         |
|  |            |                     | EOM = End of Month     | S = Until Superseded  |
|  |            |                     | EOY = End of Year      | V = Vital             |

## Jefferson County Records Retention Schedule

Department: Sheriff

Revised: ~~10/11/2016~~/2008

| Record Title                                   | State Code | Authority | <del>Retention Period (Years<br/>are in addition to -Plus<br/>Current Year)Retention<br/>Years - Plus Current<br/>Year</del> | Official Copy |
|--|------------|-----------|--|---------------|
| <b><i>Administration</i></b>                   |            |           |  |               |
| Accidents, Squad                               | W          |           | 8  | YES           |
| Bailiff Activity Report                        | W          |           | 8  | YES           |
| Cash Receipts                                  | W          |           | 8  | YES           |
| Conveyance Cards                               | W          |           | 8  | YES           |
| Daily Roll Call Rosters                        | W          |           | 8  | YES           |
| Department General Orders                      | W          |           | P  | YES           |
| Disbursements and Deposits, Computer Printouts | W          |           | 8  | YES           |
| False Alarm Fee Documentation, Uncollectable   | W          |           | 8  | YES           |
| Grant Reports and Documentation                | W          |           | 8  | YES           |

|   |          |  |          |            |
|---|----------|--|----------|------------|
| <b>Internal Investigation Files</b>         | <b>W</b> |  | <b>8</b> | <b>YES</b> |
| <b>Overtime Cards</b>                       | <b>W</b> |  | <b>8</b> |            |
| <b>Photostat Accounts</b>                   | <b>w</b> |  | <b>8</b> | <b>YES</b> |
| <b>Psychological Evaluations (Employee)</b> | <b>W</b> |  | <b>P</b> | <b>YES</b> |
| <b>Sheriff Sales, Calendar Log</b>          | <b>W</b> |  | <b>8</b> | <b>YES</b> |
| <b>Sheriff Sales, Real Estate</b>           | <b>W</b> |  | <b>8</b> |            |
| <b>Warrants Teletypes / Municipalities</b>  | <b>W</b> |  | <b>8</b> |            |
| <b>Policy &amp; Procedure Manual</b>        | <b>W</b> |  | <b>S</b> | <b>YES</b> |
| <b><i>Civil Process</i></b>                 |          |  |          |            |
| <b>Civil Process Billings, Closed</b>       | <b>W</b> |  | <b>8</b> | <b>YES</b> |
| <b>Civil Process Daily Ledgers</b>          | <b>W</b> |  | <b>8</b> | <b>YES</b> |
| <b>Dockets, Civil</b>                       | <b>W</b> |  | <b>8</b> | <b>YES</b> |
| <b>Dockets</b>                              | <b>W</b> |  | <b>8</b> | <b>YES</b> |
| <b>Executions</b>                           | <b>W</b> |  | <b>8</b> | <b>YES</b> |

|                                      |           |  |          |            |
|--------------------------------------|-----------|--|----------|------------|
| <b>Foreclosures, Sheriff's Sales</b> | <b>W</b>  |  | <b>8</b> | <b>YES</b> |
| <b>Injunctions</b>                   | <b>W</b>  |  | <b>8</b> | <b>YES</b> |
| <b>Process Bookkeeping Records</b>   | <b>W</b>  |  | <b>8</b> | <b>YES</b> |
| <b>Process Invoices</b>              | <b>W</b>  |  | <b>8</b> | <b>YES</b> |
| <b>Restraining Orders</b>            | <b>W</b>  |  | <b>8</b> | <b>YES</b> |
| <b>Sheriff Sales, Real Estate</b>    | <b>W</b>  |  | <b>8</b> | <b>YES</b> |
| <b><i>Communications Center</i></b>  |           |  |          |            |
| <b>911 Phone Activity</b>            | <b>NA</b> |  | <b>8</b> | <b>YES</b> |
| <b><i>Court Services</i></b>         |           |  |          |            |
| <b>Warrants</b>                      | <b>W</b>  |  | <b>8</b> | <b>YES</b> |
| <b>Warrants, Cancelled</b>           | <b>W</b>  |  | <b>8</b> | <b>YES</b> |
| <b><i>Detective Bureau</i></b>       |           |  |          |            |
| <b>Citizen Complaints</b>            | <b>W</b>  |  | <b>P</b> | <b>YES</b> |
| <b>Incident Reports</b>              | <b>W</b>  |  | <b>P</b> | <b>YES</b> |

|   |            |  |          |            |
|---|------------|--|----------|------------|
| <b>Incident Reports, Juvenile</b>         | <b>W</b>   |  | <b>P</b> | <b>YES</b> |
| <b>Internal Investigation Files</b>       | <b>W</b>   |  | <b>P</b> | <b>YES</b> |
| <b>Tactical Call Files</b>                | <b>W</b>   |  | <b>P</b> | <b>YES</b> |
| <b><i>Drug Unit</i></b>                   |            |  |          |            |
| <b>Asset Forfeitures</b>                  | <b>W</b>   |  | <b>8</b> | <b>YES</b> |
| <b>Confidential Informant File</b>        | <b>N/A</b> |  | <b>P</b> | <b>YES</b> |
| <b>Drug Tracks</b>                        | <b>W</b>   |  | <b>8</b> | <b>YES</b> |
| <b>Evidence Destruction File</b>          | <b>W</b>   |  | <b>8</b> | <b>YES</b> |
| <b>Fleet Leased Contracts</b>             | <b>W</b>   |  | <b>8</b> |            |
| <b>Gang Profile Intelligence Records</b>  | <b>W</b>   |  | <b>8</b> | <b>YES</b> |
| <b>Incident Reports</b>                   | <b>W</b>   |  | <b>P</b> | <b>YES</b> |
| <b>Intelligence Request</b>               | <b>W</b>   |  | <b>P</b> | <b>YES</b> |
| <b>Known Offender File (KOF) Lawsuits</b> | <b>W</b>   |  | <b>8</b> | <b>YES</b> |
| <b><i>Huber Facility</i></b>              |            |  |          |            |

|                                   |          |   |          |            |
|-----------------------------------|----------|---|----------|------------|
| <b>Bank Deposits</b>              | <b>W</b> |   | <b>8</b> | <b>YES</b> |
| <b>Bank Reconciliation's</b>      | <b>W</b> |   | <b>8</b> | <b>YES</b> |
| <b>Cancelled Checks</b>           | <b>W</b> |   | <b>8</b> | <b>YES</b> |
| <b>Cash Receipts</b>              | <b>W</b> |   | <b>8</b> | <b>YES</b> |
| <b>Cell Check</b>                 | <b>W</b> |   | <b>8</b> | <b>YES</b> |
| <b>Check Stubs</b>                | <b>W</b> |   | <b>8</b> | <b>YES</b> |
| <b>Daily Inmate Roster</b>        | <b>W</b> | WI Adm. Code<br>DOC 348.09(4)               | <b>8</b> | <b>YES</b> |
| <b>Electronic Monitoring Log</b>  | <b>W</b> |   | <b>8</b> | <b>YES</b> |
| <b>Federal Billing</b>            | <b>W</b> |   | <b>8</b> |            |
| <b>Incident Reports</b>           | <b>W</b> |   | <b>P</b> |            |
| <b>Inmate Discipline Records</b>  | <b>W</b> | WI Adm. Code DOC<br>348.09(3)               | <b>8</b> | <b>YES</b> |
| <b>Inmate Incarceration Files</b> | <b>W</b> |   | <b>8</b> | <b>YES</b> |
| <b>Inmate Medical Records</b>     | <b>W</b> | WI Stats 146.81-146.83 and<br>DOC 348.09(2) | <b>8</b> | <b>YES</b> |
| <b>Jail Register</b>              | <b>N</b> |   | <b>8</b> | <b>YES</b> |

|   |            |                               |   |            |
|---|------------|-------------------------------|---|------------|
| <b>Registration of Visitors</b>                           | <b>W</b>   | WI Adm. Code DOC<br>348.09(4) | 8 | <b>YES</b> |
| <b>Stayed and Transfer Files</b>                          | <b>W</b>   |                               | 8 | <b>YES</b> |
| <b>Inmate Time</b>  | <b>W</b>   |                               | 8 | <b>YES</b> |
| <b><i>Identification Bureau</i></b>                       |            |                               |   |            |
| <b>Auction Records</b>                                    | <b>W</b>   |                               | 8 | <b>YES</b> |
| <b>Death Investigation Negatives, Sensitive in Nature</b> | <b>W</b>   |                               | P | <b>YES</b> |
| <b>Evidence, Major Cases</b>                              | <b>W</b>   |                               | 5 | <b>YES</b> |
| <b>Finger Print</b>                                       | <b>W</b>   |                               | P |            |
| <b>Incident Reports</b>                                   | <b>W</b>   |                               | P |            |
| <b>Jail Registers</b>                                     | <b>N</b>   |                               | 8 |            |
| <b>Mug Shots</b>  | <b>N/A</b> |                               | P | <b>YES</b> |
| <b>Property Inventories</b>                               | <b>N/A</b> |                               | P | <b>YES</b> |
| <b>Traffic Accident Photos</b>                            | <b>W</b>   |                               | 8 | <b>YES</b> |
| <b><i>Jail</i></b>  |            |                               |   |            |

|  |          |                                |         |            |
|--|----------|--------------------------------|---------|------------|
| <b>Bail Receipts</b>   | <b>W</b> |                                | 2       | <b>YES</b> |
| <b>Block Check Sheets</b>                                      | <b>W</b> |                                | 8       | <b>YES</b> |
| <b>Cancelled Checks, Jail</b>                                  | <b>W</b> |                                | 8       | <b>YES</b> |
| <b>Commissary Receipts</b>                                     | <b>W</b> |                                | 8       | <b>YES</b> |
| <b>Contract Employee Files</b>                                 | <b>W</b> |                                | EVT + 5 |            |
| <b>Critical Incidents (i.e. fire, assaults, suicide, etc.)</b> | <b>W</b> |                                | 8       |            |
| <b>Daily Attendance Rosters</b>                                | <b>W</b> |                                | 8       | <b>YES</b> |
| <b>Daily Roster Lockup Sheets</b>                              | <b>W</b> |                                | 8       | <b>YES</b> |
| <b>Daily Shift Roster (where employee worked)</b>              | <b>W</b> |                                | 8       |            |
| <b>Fire Equipment &amp; Inspection Report</b>                  | <b>W</b> |                                | 8       | <b>YES</b> |
| <b>Inmate Files</b>  | <b>N</b> | WI STAT 59.27(9) & 16.61(3)(b) | 8       | <b>YES</b> |
| <b>Inmate Property Release Form</b>                            | <b>W</b> |                                | 8       | <b>YES</b> |
| <b>Jail Bank Account</b>                                       | <b>W</b> |                                | 8       |            |
| <b>Jail Kitchen Menu</b>                                       | <b>W</b> |                                | 8       | <b>YES</b> |

|   |          |  |       |            |
|---|----------|--|-------|------------|
| <b>Jail Kitchen Operating Reports</b>             | <b>W</b> |  | 8     |            |
| <b>Jail Inmate Roster</b>                         | <b>W</b> |  | C     | <b>YES</b> |
| <b>Law Suits and Complaints</b>                   | <b>W</b> |  | 8     |            |
| <b>Monthly Equipment Check</b>                    | <b>W</b> |  | 8     | <b>YES</b> |
| <b>Municipal Billings</b>                         | <b>W</b> |  | 8     |            |
| <b>Shift Logs</b>                                 | <b>W</b> |  | 8     | <b>YES</b> |
| <b>Strip Search Log</b>                           | <b>W</b> |  | 8     | <b>YES</b> |
| <b>Visitor Logs</b>                               | <b>W</b> | WI Adim. Code DOC<br>348.09 (4)                                | 8     | <b>YES</b> |
| <b>Medical</b>                                    |          |  |       |            |
| <b>Medical Clinic Appointment Sheet</b>           | <b>W</b> |  | 8     | <b>YES</b> |
| <b>Medical Infection Control Logs</b>             | <b>W</b> | Wi Adm. Code DOC.<br>350.21(1)                                 | C     | <b>YES</b> |
| <b>Medical Inmate Sick Call Lists and Reports</b> | <b>W</b> | WI Adm. Code Doc.<br>350.21 (1)                                | C     | <b>YES</b> |
| <b>Inmate Medical Records</b>                     | <b>W</b> | WI Stats 146.81 to 146.83<br>and WI Adm. Code<br>Doc.350.09(3) | EVT+8 | <b>YES</b> |
| <b>Medical Screening Records (Booking Sheets)</b> | <b>W</b> | WI Adim. Code DOC. 350.18                                      | EVT+8 | <b>YES</b> |

|  |          |  |                 |     |
|--|----------|--|-----------------|-----|
| <b>Patrol Division</b>   |          |  |                 |     |
| Daily Roll Call Rosters  | W        |  | 8               |     |
| False Alarm Card File  | W        |  | 8               | YES |
| False Alarm Service Fee and Door Openings                              | W        |  | 8               | YES |
| Fleet Maintenance Records, Patrol Division                             | W        |  | LOP             | YES |
| Intern Records, Patrol Division  | W        |  | 8               | YES |
| <b>Records</b>   |          |  |                 |     |
| Accident Reports   | W        |  | 8               | YES |
| Accident Reports, Non-Reportable                                       | W        |  | 8               | YES |
| <u>Body Camera, Vehicle Camera and Jail Audio and Video Recordings</u> | <u>W</u> |  | <u>121 Days</u> |     |
| Citations  | W        |  | 8               | YES |
| Court Occurrence Records   | W        |  | 8               | YES |
| Invoice Edit and Update Reports, Interdepartmental                     | W        |  | 8               | YES |
| Employee Worker's Compensation, Closed                                 | W        |  | 8               |     |

|  |          |  |                    |            |
|--|----------|--|--------------------|------------|
| <b>Incident Reports</b>                                | <b>W</b> |  | <b>P</b>           | <b>YES</b> |
| <b>Injunctions</b>                                     | <b>W</b> |  | <b>8</b>           | <b>YES</b> |
| <b>Intoxallizer Recertification</b>                    | <b>W</b> |  | <b>S</b>           | <b>YES</b> |
| <b>Money Transfer Log, Front Desk</b>                  | <b>W</b> |  | <b>8</b>           | <b>YES</b> |
| <b>Operating While Under the Influence (OW) Report</b> | <b>W</b> |  | <b>8</b>           | <b>YES</b> |
| <b>Orders to Produce (Writs)</b>                       | <b>W</b> |  | <b>8</b>           | <b>YES</b> |
| <b>Patrol Roster</b>                                   | <b>W</b> |  | <b>2</b>           | <b>YES</b> |
| <b>Radar Certification Logs</b>                        | <b>W</b> |  | <b>LOP</b>         | <b>YES</b> |
| <b>Registration of County Vehicles</b>                 | <b>W</b> |  | <b>LOP</b>         |            |
| <b>Restraining Orders</b>                              | <b>W</b> |  | <b>8</b>           | <b>YES</b> |
| <b>State Uniform Crime Report</b>                      | <b>W</b> |  | <b>P</b>           | <b>YES</b> |
| <b>Traffic Fatalities</b>                              | <b>W</b> |  | <b>8</b>           | <b>YES</b> |
| <b>Warning Notices</b>                                 | <b>W</b> |  | <b>EVT+ 6 mos.</b> | <b>YES</b> |

**Historical Society Codes**

**Retention Codes**

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S = Until ~~Superseded~~Superseded

V = Vital



## Jefferson County Records Retention Schedule

Department: Treasurer

Revised: 10/11/20164/2008

| Record Title                          | State Code | Authority                | <u>Retention Period (Years are in addition to Current Year)</u><br><del>Retention Years - Plus Current Year</del> | Official Copy |
|---------------------------------------|------------|--------------------------|---|---------------|
| Accounts Payable Log                  | W          |                          | 3   | YES           |
| Bank Reconciliation and Adjustments   | W          |                          | 7   | YES           |
| Bids / Proposals                      | W          | WI Stats 59.52(4)(a)(10) | 7 AT  |               |
| Cash Balance,                         | W          | WI Stats 59.52(4)(a)(15) | 7   | YES           |
| Cash Register Tapes (continuous roll) | W          | WI Stats 59.52(4)(a)(15) | 7   | YES           |
| Check Registers                       | W          | WI Stats 59.52(4)(a)(15) | 7   | YES           |
| Checks, Cancelled/Voided              | W          | WI Stats 59.52(4)(a)(16) | 7   | YES           |
| County Owned Property List            | W          |                          | S   | YES           |
| Daily Bank Deposits                   | W          |                          | 2   | YES           |
| In REM                                | W          | WI Stats 75.521          | 15  | YES           |

|   |          |   |           |            |
|---|----------|---|-----------|------------|
| <b>Investment Proposals</b>                       | <b>W</b> |   | <b>3</b>  |            |
| <b>Investment Reports</b>                         | <b>W</b> |   | <b>7</b>  | <b>YES</b> |
| <b>NSF (Non-Sufficient Funds) Check</b>           | <b>W</b> |   | <b>7</b>  | <b>YES</b> |
| <b>Plat Books</b>                                 | <b>N</b> |   | <b>S</b>  | <b>YES</b> |
| <b>Probate Fees Report</b>                        | <b>W</b> |   | <b>7</b>  | <b>YES</b> |
| <b>Real Estate Transfer Fees</b>                  | <b>W</b> |   | <b>7</b>  | <b>YES</b> |
| <b>Receipts, General</b>                          | <b>W</b> | WI Stats 59.52(4)(a)(15)                    | <b>7</b>  | <b>YES</b> |
| <b>Sale Book</b>                                  | <b>W</b> |   | <b>15</b> | <b>YES</b> |
| <b>Settlement, Receipts and Related Documents</b> | <b>W</b> | WI Stats 59.52(4)(a)(14)                    | <b>15</b> | <b>YES</b> |
| <b>Stop Payment</b>                               | <b>W</b> |   | <b>7</b>  | <b>YES</b> |
| <b>Tax Apportionment</b>                          | <b>W</b> | WI Stats 59.52(4)(a)(1,2)                   | <b>3</b>  | <b>YES</b> |
| <b>Tax Receipts/Bills</b>                         | <b>W</b> | WI Stats 59.52(4)(a)(14)                    | <b>15</b> | <b>YES</b> |
| <b>Tax Rolls</b>                                  | <b>N</b> | WI Stats 59.52(4)(b)(2) &<br>59.52(4)(c)(2) | <b>15</b> |            |
| <b>Wire Transfer Statements</b>                   | <b>W</b> |   | <b>7</b>  | <b>YES</b> |

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|--|------------------------|---|
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|  | EOM = End of Month     | S = Until <del>Superceded</del> <u>Superseded</u> |
|  | EOY = End of Year      | V = Vital   |



## Jefferson County Records Retention Schedule

Department: UW-Extension

Revised: 10/11/20163/2008

| Record Title                              | State Code  | Authority | <u>Retention Period (Years are in addition to Current Year)</u><br><del>Retention Years - Plus Current Year</del> | Official Copy |
|---|-------------|-----------|---|---------------|
| 4-H Committee Minutes                     | <u>NA</u>   |           | 7   | YES           |
| 4-H Enrollment Forms                      | <u>NA</u>   |           | y   | YES           |
| 4-H Leaders Association Financial Records | <u>NA</u>   |           | 7   | YES           |
| 4-H Leaders Association Minutes           | <u>NA</u>   |           | 7   | YES           |
| 4-H Name and Emblem Report                | <u>NA</u>   |           | 7   |               |
| Annual Report - Department                | <u>NA -</u> |           | 4   |               |
| Camp/Trip Medical/Health Histories        | <u>NA</u>   |           | 7   | YES           |
| Civil Rights Forms/Reports/Files          | <u>NA</u>   |           | 7   | YES           |
| Club/Committee Information                | <u>NA</u>   |           | 7   | YES           |
| Criminal Records Checks                   | <u>NA -</u> |           | C   | YES           |

|  |           |   |                                   |     |
|--|-----------|---|-----------------------------------|-----|
| ES-237 (Annual Federal Statistical Report)   | <u>NA</u> |   | 7                                 | YES |
| Extension Education Committee Minutes  | <u>NA</u> |   | 7                                 |     |
| Licenses - Software  | <u>NA</u> |   | LOP                               | YES |
| Mailing Lists  | <u>NA</u> |   | C                                 | YES |
| Maintenance Agreement (Copier)   | <u>NA</u> |   | LOP                               | YES |
| Room Use Schedules   | <u>NA</u> |   | 3                                 |     |
| Tractor Safety Participant Registries/Enrollments  | <u>NA</u> |   | Until Participant is 14 Years Old | YES |
| Volunteer Application Forms  | <u>NA</u> |   | Leader Ceases Involvement + 7     | YES |
| <b>Historical Society Codes</b>  |           | <b>Retention Codes</b>  |                                   |     |
| N = Notify      W = Waived      NA = Not Applicable  |           | AA = After Audit      EVT = Event Date                                    |                                   |     |
|  |           | AS = After Settlement      LOP = Life of Product                          |                                   |     |
|  |           | AT = After Termination      M = Months                                    |                                   |     |
|  |           | C = Current Only      P = Permanent                                       |                                   |     |
|  |           | EOM = End of Month      S = Until <del>Superseded</del> <u>Superseded</u> |                                   |     |
|  |           | EOY = End of Year      V = Vital  |                                   |     |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |           |   |                                   |     |

## Jefferson County Records Retention Schedule

Department: Veteran's Services

Revised: 10/11/2016/2008

| Record Title  | State Code | Authority | <u>Retention Period</u><br>(Years are in addition to<br>Current Year) <del>Retention</del><br><del>Years -- Plus Current</del><br>Year | Official Copy |
|---|------------|-----------|--|---------------|
| Cemetery List - Jefferson County                    | N/A        |           | P  | YES           |
| Commemorative Event Information                     | W          |           | 10   | YES           |
| News Releases                                       | W          |           | 10   | YES           |
| Regulations   | W          |           | S  | YES           |
| Veterans' Personnel Cards                           | W          |           | P  | YES           |
| Veterans' Personnel Records                         | W          |           | P  | YES           |
| Veterans' Relief Records                            | W          |           | 10   | YES           |
| Volunteer Driver Files, Expenses                    |            |           | 7  | YES           |
| Wisconsin Department of Veterans' Affairs Bulletins | W          |           | P  |               |

| Historical Society Codes   | Retention Codes        |   |
|--|------------------------|---|
| N = Notify      W = Waived      NA = Not Applicable  | AA = After Audit       | EVT = Event Date                                  |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> | AS = After Settlement  | LOP = Life of Product                             |
|  | AT = After Termination | M = Months  |
|  | C = Current Only       | P = Permanent                                     |
|  | EOM = End of Month     | S = Until <del>Supereeded</del> <u>Superseded</u> |
|  | EOY = End of Year      | V = Vital   |

## Jefferson County Records Retention Schedule

Department: UW-Extension

Revised: ~~3/2008~~10/11/2016

| Record Title                                     | State Code | Authority | Retention Period<br>(Years <u>are in addition</u><br><u>to --Plus--</u> Current Year) | Official Copy |
|--|------------|-----------|---|---------------|
| <u>4-H Committee Minutes</u>                     | -          | -         | <u>7</u>  | <u>YES</u>    |
| <u>4-H Enrollment Forms</u>                      | -          | -         | <u>7</u>  | <u>YES</u>    |
| <u>4-H Leaders Association Financial Records</u> | -          | -         | <u>7</u>  | <u>YES</u>    |
| <u>4-H Leaders Association Minutes</u>           | -          | -         | <u>7</u>  | <u>YES</u>    |
| <u>4-H Name and Emblem Report</u>                | -          | -         | <u>7</u>  | -             |
| <u>Annual Report - Department</u>                | -          | -         | <u>4</u>  | -             |
| <u>Camp/Trip Medical/Health Histories</u>        | -          | -         | <u>7</u>  | <u>YES</u>    |
| <u>Civil Rights Forms/Reports/Files</u>          | -          | -         | <u>7</u>  | <u>YES</u>    |
| <u>Club/Committee Information</u>                | -          | -         | <u>7</u>  | <u>YES</u>    |
| <u>Criminal Records Checks</u>                   | -          | -         | <u>C</u>  | <u>YES</u>    |

|  |   |  |  |            |
|--|---|--|--|------------|
| <u>ES-237 (Annual Federal Statistical Report)</u>  | - | -  | <u>7</u>                                 | <u>YES</u> |
| <u>Extension Education Committee Minutes</u>   | - | -  | <u>7</u>                                 | -          |
| <u>Licenses - Software</u>   | - | -  | <u>LOP</u>                               | <u>YES</u> |
| <u>Mailing Lists</u>   | - | -  | <u>C</u>                                 | <u>YES</u> |
| <u>Maintenance Agreement (Copier)</u>  | - | -  | <u>LOP</u>                               | <u>YES</u> |
| <u>Room Use Schedules</u>  | - | -  | <u>3</u>                                 | -          |
| <u>Tractor Safety Participant Registries/Enrollments</u>   | - | -  | <u>Until Participant is 14 Years Old</u> | <u>YES</u> |
| <u>Volunteer Application Forms</u>   | - | -  | <u>Leader Ceases Involvement + 7</u>     | <u>YES</u> |
| <b>Historical Society Codes</b>  |   | <b>Retention Codes</b>                           |  |            |
| N = Notify      W = Waived      NA = Not Applicable  |   | AA = After Audit      EVT = Event Date           |  |            |
| <b>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</b> |   | AS = After Settlement      LOP = Life of Product |  |            |
|  |   | AT = After Termination      M = Months           |  |            |
|  |   | C = Current Only      P = Permanent              |  |            |
|  |   | EOM = End of Month      S = Until Superseded     |  |            |
|  |   | EOY = End of Year      V = Vital                 |  |            |