

City of Waukesha Records Retention Schedule

September, 2019

For use by all City departments except Police Department and Municipal Court

Notes:

The Schedule can be searched in three ways:

- By the index
- The items are listed alphabetically in the Schedule
- Hit CTRL+F and type in key words to search schedule

The retention period for any records that are not found in this schedule is 7 years after last use.

“WHS Notification” refers to whether the Wisconsin Historical Society must be notified before the records are discarded. Please contact the City Attorney’s Office with any questions about records retention or disposal.

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Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Abandoned Mains and Services As-Built	Records may include final designs and location maps. Includes plans of private sewer and water systems.	Permanent	No	
Aerial Photographs	Aerial photographs used for planning and map creation.	Event; Event = Superseded	No	Yes
Affidavits of Publication	Records providing proof of publication for legal notices as required by law. (Note: See Wis. Stat. §985.12 for more information on proof of publication).	Event + 7 years; Event = Date of publication	No	No
Affirmative Action Records	Affirmative action plans, related complaints, EEO-1 reports.	Duration of federal contract or 1 year after termination of employment EEO-1 reports – 1 year after superseded	No	No
Agendas and Minutes	Official agendas and minutes of the Common Council.	Permanent	No	
Ambulance Runs	Records of ambulance runs, including medical records.	Creation + 7 years	Medical records - yes	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
American with Disabilities Act (ADA) Facility Reviews	Records cover ADA inspections, investigations, complaint investigations, facility logs and reports regarding ADA compliance relating to facilities and structures.	Event + 6 years; Event = Close of review or audit	No	No
Annexation Records	Incorporation records such as petitions, hearing testimony and exhibits, court orders, notices, resolutions, and related correspondence.	Permanent	No	
Annual Reports	Annual reports produced by all departments and programs.	Event + 7 years; Event = Date of issue	No	Yes
Applications for Absentee Ballots (Federal Elections)	Includes copies of proof of identification when submitted with application. Authority provided by Wis. Stat. §7.23(1)(f).	Event + 22 months; Event = Election	No	No
Applications for Absentee Ballots (State, County, Local Elections)	Includes copies of proof of identification when submitted with application. Authority provided by Wis. Stat. §7.23(1)(k).	Event + 90 days; Event = Election	No	No
Applications for Employment – Not Hired	Applications, resumes, curriculum vitae submitted by unsuccessful applicants for employment.	1 year from date of receipt	Yes	No
Applications for Employment – Hired	Applications, resumes, curriculum vitae submitted by successful applicants for employment	7 years after termination of employment	Yes	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Appointment Files	Materials documenting appointments and nominations to boards, task forces, councils, or other bodies. May include applications; cover sheets, letters of recommendation, resumes, and correspondence.	Event + 2 years; Event = End of term	No	Yes
Appointment Files – Not Approved	Unsuccessful appointments and nominations to boards, task forces, councils, or other bodies.	Event + 1 year; Event = Position filled	No	No
Arson Investigations	Reports of arson investigations.	Permanent	Yes	
Asbestos and Hazardous Material and Environmental Remediation Case File	Project files on asbestos abatement and hazardous materials and environmental remediation projects at state owned buildings.	Event + 30 years; Event = Completion of the project	Yes	No
Assessor's Final Reports	Documents yearly changes to master property record and personal property returns. Final report is filed with DOR.	Event + 5 years; Event = Final report filed with DOR	No	No
Attorney Opinions	Municipal attorney opinions given to answer specific questions regarding the interpretation and application of statutes and ordinances, or other legal matters.	Permanent	No	

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Audio Tapes	Recordings of meetings used to produce minutes. Authority provided by Wis. Stat. §19.21(7).	Event + 90 days; Event = Date the minutes have been approved and published	No	No
Audit Reports	Reports that evaluate the financial holdings of the municipality.	Event + 3 years; Event = Final report issued	No	No
Ballots (Federal Elections)	Federal election ballots. Authority provided by Wis. Stat. §7.23(1)(f).	Event + 22 months; Event = Election	No	No
Ballots (State, County, Local Elections)	State, county, local offices. Authority provided by Wis. Stat. §7.23(1)(h).	Event + 30 days; Event = Election	No	No
Ballots (Unused and related Materials)	Only applies to unused ballots and materials. Authority provided by Wis. Stat. §7.23(1)(a).	Event + 3 business days; Event = Completion of all election canvasses	No	No
Board of Review Form of Objection	Objections submitted by taxpayers. Includes written objections and all other material submitted to the board of review.	Event + 7 years; Event = Final action of Board of Review or completion of appeal	No	No
Board of Review Minutes	Record of all proceedings of the board of review. Authority provided by Wis. Stat. §70.47(5).	Creation + 7 years	No	Yes

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Board of Review Notice of Determination	Final decisions sent to property owners. Authority provided by Wis. Stat. §70.47(12).	Event + 7 years; Event = Final action of Board of Review or completion of appeal	No	No
Board of Review Proceedings	Includes audio recordings and any transcripts of board of review proceedings, along with any notes taken by clerk. Authority provided by Wis. Stat. §70.47(8)(f).	Event + 7 years; Event = Final action of Board of Review or completion of appeal	No	No
Budget Development Documents	Records include final budget requests (forms or their equivalents), justifications/analysis, policy papers, related correspondence, and requests for information.	Fiscal + 6 years	No	No
Building Inspection Records	Summary of inspection history of a particular property. Records include original building permit, site plans, certificate of occupancy, conditional use documents, comprehensive design reviews, and violations for both residential and commercial structures. Also includes inspection of plumbing, electrical, ventilation, heating, and air conditioning.	Event + 1 year; Event = Life of building	No	No
Building Inspection: Residential 1 and 2 Family Dwellings	Applications forms, correction orders, correspondence and inspection records. Authority provided by Wis. Admin. Code §SPS 320.10(6)(a)3.	Event + 7 years; Event = Construction completed	No	No
Building Lease Files	Files on leased facilities.	Event + 7 years; Event = End of lease	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Building Maintenance: Equipment Repair and Service Records	Documents the installation, maintenance, service and history of equipment commonly used to maintain facilities.	Event + 1 month; Event = Removal and disposal of equipment	No	No
Building Plan Review and Inspection	Conditionally approved building plans, calculations, and correspondence. Authority provided by Wis. Admin. Code §SPS 361.60(5)(f)1.b. Note: applies to certified municipalities only (see Wis. Admin. Code §SPS 361.60(2)).	Event + 4 years; Event = Construction completed	No	No
Building Plans: Residential 1 and 2 Family Dwellings	Includes architectural, design specs, structural and utility plans submitted for inspection review. Authority provided by Wis. Admin. Code §SPS 320.10(6)(a)2.	Event + 4 years; Event = Construction completed	No	No
Bus Route Schedules and Timetables	Documentation of transit schedules, timetables, routes, and route history.	Event + 3 years; Event = Superseded	No	No
Business Continuity Plan	Agency official plan and documentation of the continuity of operations plan/continuity of government plan.	Event; Event = superseded by revised plan	No	No
Cadastral Maps	Includes any plats, assessor's plats, certified surveys, or aerial photographs used in determining taxable boundaries.	Permanent	No	

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Campaign Finance Reports	Financial disclosure reports filed by candidates during election campaigns. Authority provided by Wis. Stat. §7.23(1)(d).	Event + 6 years; Event = date of receipt	No	No
Campaign Registration Statements	Statements filed by candidates for public office. Includes Notification of Non-candidacy for reelection forms. Authority provided by Wis. Stat. §7.23(1)(d).	Event + 6 years; Event = termination issued by the registrant	No	No
Canvassers Statements	Official statement showing the results of each election. Authority provided by Wis. Stat. §7.23(1)(i).	Event + 10 years; Event = election	No	No
Cemetery Annual Report and Documentation	Includes the annual report to the cemetery board and the records needed to prepare the report. Authority provided by Wis. Stat. §157.62(4).	Permanent	No	
Cemetery Care Funds	An accounting of amounts deposited in, amounts withdrawn from, other income accruing to, and the balance at the end of the reporting period of care funds of the cemetery, including the funds in Wis. Stat. §157.11(9g)(a), Wis. Stat. §157.12(3), and Wis. Stat. §157.125. Including records that show, for each deposit, the name of the purchaser or beneficiary of the contract relating to the deposit and the item purchased. Authority provided by Wis. Stat. §157.62(4).	Permanent	Yes Confidential per Wis. Stat. §157.62(2)(c)	
Cemetery Contract for Sale	Copy of each contract for the sale of a cemetery lot, mausoleum space, or cemetery merchandise. Authority provided by Wis. Stat. §157.62(4).	Event = 3 years; Event = After all of the obligations of the contract have been fulfilled	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Cemetery Grave Registration Records	Records that describe who is buried, the date of death, interment and location of the remains.	Permanent	No	
Cemetery Preneed Trust Funds	<p>An accounting of amounts deposited in, amounts withdrawn from, income accruing to, and the balance at the close of the reporting period of any preneed trust funds of the cemetery.</p> <p>Including records that show, for each deposit, the name of the purchaser or beneficiary of the contract relating to the deposit and the item purchased. Authority provided by Wis. Stat. §157.62(4).</p>	Event + 15 years; Event = Date of the deposit or withdrawal	Yes Confidential per Wis. Stat. §157.62(2)(c)	No
Cemetery Reburial of Human Remains	<p>Includes records confirming an attempt to notify individuals specified in Wis. Stat. 157.112(3)(b)1.-4. when none of the individuals specified are available.</p> <p>Authority provided by Wis. Stat. §157.112(3m).</p>	Permanent	No	
Cemetery Report for Final Disposition	<p>Report for final disposition completed by the funeral director or other person preparing the body for burial or other final disposition. The reports are filed with the local register, but may also be filed with the cemetery to serve as a record of interment. Authority provided by Wis. Stat. §135.06(1)(a)(1).</p>	Permanent	No	
Check Registers, Bank Statements/ Reconciliations	Check registers, statements of account received from institutions holding the municipality's funds.	Creation + 7 years	No	No
Claims, Notices of Claim, Notices of Injury	Notices of claims against the City and itemized statements of damages, as required by Wis. Stat. §893.80.	Receipt + 7 years	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Code Compliance Inspection Reports	Reports completed during field investigations to determine if buildings and system installations comply with the specifications of appropriate codes.	Permanent	No	
Collection & Disbursement Reports	Reports showing the amounts collected, amounts retained by county/local government, and portion sent to state.	Event + 3 years; Event = Transaction date	No	No
Committee Agendas, Records and Minutes	Records of committees, boards, and commissions, other than Common Council. Includes meeting minutes, agenda packets, reports, and resolutions.	Creation + 7 years	No	Yes
Complaints (External)	File related to complaints regarding issues not related to a specific program. Complaints are not otherwise regulated by state or federal requirements.	Event + 2 years; Event = Complaint resolution, dismissal or end of litigation	No	No
Composting Regulations	Documents pertaining to the disposal of yard waste.	Event + 7 years; Event = superseded	No	No
Comprehensive Plan	Provides general goals, objectives, policies and implementation recommendations to guide the future growth and development of the city.	Event + 14 years; Event = Superseded by new plan	No	Yes

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Conditional Use Permits	<p>Applications and related documents for a conditional use permit. Applications include site plan, applicate statement, and evidence evidence/documentation.</p> <p>This series may also include public hearing notice, reports, public hearing documentation, and decision.</p>	Event + 7 years; Event = termination of conditional use permit	No	No
Construction Plans: Final As-Built Projects	Final as-built plans and original drawings for public for buildings, streets, sewers, sidewalks, etc.	Event; Event = life of structure	No	No
Construction Plans: Final As-Built Projects (Historically Significant)	Use for historically significant projects.	Event; Event = life of structure	No	Yes
Contracts and Agreements	Any contracts or agreements to which the municipality is a party.	Event + 6; Event = End date or cancellation of contract	No	No
Correspondence of Senior Level or Elected Official	Business-related correspondence (paper and electronic) of senior level staff and elected officials.	<p>Event + 6 months; Event = Separation from position/end of term</p> <p>Note: Correspondence that relates specifically to a program or project may need to be retained per that particular schedule</p>	No	Yes

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Correspondence (general staff)	Business-related correspondence (paper and electronic) of non-appointed general staff.	Event + 1 year; Event = Creation or receipt Note: Correspondence that relates specifically to a program or project may need to be retained per that particular schedule	No	No
Credit Card Receipts or Information Received from Sales	Credit card receipts and related documentation associated with credit card transactions.	Event + 3 years; Event = Transaction date	No	No
Critical Incident Management Plans	Critical incident management plans, local site security plans, local emergency action plans, life safety, and other similar documents.	Event + 3 years; Event = superseded by revised plan	No	No
Curbside Recycling Program	Documentation of the curbside recycling program including policies, procedures, and administration of the program.	Event + 7 years; Event = superseded	No	No
Deposition Transcripts	Original transcripts of depositions taken as part of a lawsuit.	1 year after expiration of appeal period	Possibly, case dependent	Historically significant cases only
Detachable Vote Recording Units	Data storage devices used in electronic voting equipment, general elections. Wis. Stat. §7.23(1)(g)	21 days after election	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Detachable Vote Recording Units (Primary Elections)	Data storage devices used in electronic voting equipment, primary elections. Wis. Stat. §7.23(1)(g).	14 days after election	No	No
Disaster Recovery Records	Records created during the disaster recovery process.	Event + 3 years; Event = Date recovery effort is complete	No	No
Drop Off Site/Recycling Yard Waste	Site operation files and records.	Creation + 7 years	No	No
Easements	Grants of easement to the municipality.	Permanent	No	
Election Notices	Includes proofs of publication and correspondence filed in connection with such notices. Authority provided by Wis. Stat. §7.23(1)(j).	Event + 1 year; Event = Election	No	No
Election Notices (Federal Elections)	Includes proofs of publication and correspondence filed in connection with such notices. Authority provided by Wis. Stat. §7.23(1)(j).	Event = 22 months; Event = Election	No	No
Election Voting and Registration Statistics Reports	Reports filed by municipal clerks on registration, voting, and absentee voting. Authority provided by Wis. Stat. §§6.275-6.276.	Event + 22 months; Event = Election	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Email – Elected Officials and Senior-Level Officials	City-business-related emails, both received and sent, of elected officials, department heads, city administrator, and senior-level staff.	Event + 6 months; Event = Separation from position/end of term Note: Correspondence that relates specifically to a program or project may need to be retained per that particular schedule	No	Yes
Email - General Staff	City-business-related emails, both received and sent, of elected officials, department heads, city administrator, and senior-level staff.	Event + 1 year; Event = Creation or receipt Note: Correspondence that relates specifically to a program or project may need to be retained per that particular schedule	No	Yes
Employee Payroll & Benefit File	Includes various documents that are maintained throughout the employee's term of employment.	Event + 7 years; Event = Employee retirement or termination	No	No
Environmental Assessment and Impact Statements	Official copies of environmental assessments, impact statements and related documentation related to municipal construction projects.	Event + 6 years; Event = termination of municipal ownership of the land	No	Yes
Equal Employment Opportunity Records	Form EEO-4 and other records required for reporting to the Equal Employment Opportunities Commission	7 years after filing	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Excavation Plans of Private Utilities	Plans submitted by utilities needing to excavate to develop, expand, or repair utility lines.	Permanent	No	
Final Assessment Rolls	Both real and personal property rolls.	Creation + 15 years (Provided no Forest Crop Acreage is recorded)	No	Yes
Final Budget Submittal	The final budget document for the municipality.	Fiscal + 6 years	No	No
Final Plats	A map showing the divisions of a piece of land, this series includes vacation or alterations of plats, annexation plats, and final subdivision plats.	Permanent	No	
Final Tax Roll	Real and personal property rolls. Calculated from assessment rolls to include total taxes and charges to be collected.	Creation + 15 years	No	Yes
Financial Statements	Overall record accounting for receipts and disbursements, usually for fiscal or calendar year.	Event + 7 years; Event = Audit	No	No
Financial Support Records	Records used in reconciling bank statements and verifying expenditures. Includes, but not limited to, credit/debit notices, cash reconciliations, and deposit stubs.	Event + 1 year; Event = Audit	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Fire Inspection Reports	Records of fire inspections, Fire Department plan reviews, general Fire Department inspection reports.	Creation + 7 years	No	No
Form I-9	Employment eligibility and verification form	3 years from receipt, or 1 year after termination of employment, whichever is later	Yes	No
Grants	Records relating to grant-funded projects where the agency is the grant recipient or issuer, including the application process, the receipt and expenditure of grant funds, or denial.	Event + 4 years; Event = Date of final report or notification of denial	No	No
Grievance Case File	Records of grievances filed by employees	Event + 7 years; Event = Date grievance is closed	Yes	No
Hearing Transcripts	Transcripts of contested hearings, due process hearings, hearings before boards and commissions.	7 years after expiration of appeal period	Possibly – case dependent	Yes
House Number and Address Change File	Provides official control and reference source for city addresses.	Permanent	No	No
Household Hazardous Waste Collection Center	Records related to the collection and disposal of paints, corrosives, flammables, toxics, used motor oil, and car/truck batteries.	Creation + 30 years	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Housing Authority Program Files	Correspondence, breakdown of projects, HUD regulations, and supporting files.	Event + 7 years; Event = Audit	No	Yes
Incident Report, Fire Department	Records of fire and emergency medical service runs	Creation + 7 years	No	No
Ineligible Elector Registrations	Elector registrations deemed ineligible for voting. Status and reasons for ineligibility should be noted. Authority provided by Wis. Stat. §7.23(1)(c).	Event + 4 years; Event = When deemed ineligible	No	No
Internal Policies and Procedures	Established departmental policies and procedures. Note: May also be called administrative practices or directives or executive directives.	7 years after policy is superseded or made obsolete	No	No
Invoices, Payable	Records of debts owed by the City	Creation + 7 years	No	No
Invoices, Receivable	Records of debts owed to the City	Creation + 7 years	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Issued Checks	Checks issued by the municipality that are outstanding, cancelled, or have cleared collection.	Creation + 7 years	No	No
Labor Agreements, Collective Bargaining Agreements	All records relating to union contracts	7 years after expiration	No	No
Land Titles, Conveyances and Easements	Documentation for municipal owned land. Also includes any legal rights granted to others that relate to municipal owned land.	Permanent	No	
Landfill and Garbage Dump Sites	Location of any fill, records of materials deposited, cover materials used, reports of leachate and methane leakage and treatment, source of fill materials, (household, commercial) source of cover materials, and inspection reports.	Permanent	No	
Legal Case Files	Files include, but are not limited to, pleadings and legal arguments, evidence, research, orders, legal summons and subpoenas issued.	Event + 7 years; Event = Close of case	No	Historically significant cases only
License Applications and Related Records	Includes license applications (approved and unapproved) and license stubs. Includes all non-alcohol related licenses including, but not limited to, non-intoxicating beverages, soda water beverages, food handling and sales, mobile home park licenses, restaurant, retail dairy products, dogs, pets, and animals. Also includes permits for the excavation of streets by private utility companies.	Creation + 3 years	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Liquor and Beer Licenses	Includes license applications (approved and unapproved), retail alcohol beverage licenses, bartender licenses, and license stubs. Authority provided by Wis. Stat. §125.04(3)(i).	Creation + 4 years	No	No
Maps	Series may document road locations or surfaces, zoning information, parks, flood plains, soils, or parcel boundaries. This record series may also include indexes to maps.	Permanent	No	
Maps: Construction and Topographical	May include maps covering environmental impact/changes, development of specific areas, and the impact on public infrastructure (utilities, roads, sidewalks).	Permanent	No	
Master Property Appraisal Records	Details the appraisal of real property, based on the field inspections of the assessor.	Event + 5 years; Event = Life of structure	No	Yes
Medical Leave, FMLA Records	All records relating to an employee's leave for medical reasons or matters covered by the FMLA	7 years after termination of employment	Yes	No
Medical Records and Exposure Records Required by OSHA	Employee medical records, not including health insurance claim records, records of work-related injuries, and records of employee exposures to hazardous materials, including material safety data sheets.	30 years after termination of employment	Yes	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Memoranda of understanding (MOU) & service level agreements (SLA)	Agreements between government units. Sometimes define agreements between a large government unit's separate divisions or bureaus.	Event + 6; Event = End date or cancellation of contract	No	No
Monthly and Quarterly Payroll Reports	Includes, but is not limited to, quarterly report of federal income tax withheld; quarterly report, payroll summary; state's quarterly report of wages paid, and monthly memorandum report.	Event + 5 years; Event = Report Issued (provided record has been audited)	No	No
Monthly Reports	Monthly reports of divisions or committees.	Creation + 3 years	No	No
Motor Vehicle Control and Assignment Records	Documentation of agency motor vehicle assignments to employees. Includes completed documentation on reservations for pool cars, individual trips, driver profiles, check-in and checkout logs.	Event + 1 year; Event = date the vehicle is disposed	No	No
Motor Vehicle and Heavy Equipment Maintenance Records	Records documenting service and repair orders to motor vehicles. These records normally include maintenance orders, logs, fiscal documents, such as requisitions or purchase orders for parts or services, vehicle warranties, operation and repair manuals and parts lists.	Event + 1 year; Event = date the vehicle is disposed	No	No
Municipal Bond Records	All records associated with municipal bonds. Also includes the bond register, bond payment register, and any certificates of destruction when the bond agent has been authorized to destroy cancelled bonds, coupons, and promissory notes.	Event + 7 years; Event = Bond issue expires or following payment of all outstanding matured bonds/notes/coupons, whichever is later	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Notes	Personal notes made and kept to refresh recollection.	None – not public records	No	No
Notice of Increased Assessment	Notices sent to property owners informing them of increases on assessment.	Creation + 7 years	No	No
Notice of Removal of Human Corpse	Form for the removal of a human corpse if death occurs in a hospital, nursing home, or under hospice care at any location.	Event + 2 months; Event = Date of death	No	No
Oath of Office	Elected or appointed municipal officers may be required to take, and file in writing, an official oath within ten days after receiving notice of election or appointment.	Event + 5 years; Event = End of term	No	No
Open Records Requests and Responses	Records relating to regular and reformulated, repetitious, systematic or continuing requests by individuals, groups or organizations for access to general information under the provisions of the Wis. Stats. §§19.35-19.37.	Event + 3 years; Event = Response provided	No	No
Operating Budget	Records related to establishing the base level agency annual operating budget each fiscal year.	Fiscal + 6 years	No	No
Ordinances	Official ordinances and any ordinance books kept by municipalities.	Permanent	No	

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Organizational Chart	Repository of the official organizational structure of offices.	Event; Event = Superseded	No	No
Organizational Planning	Includes division and unit strategic business and operational planning files such as, but not limited to, final plan and significant work papers.	Event + 7 years; Event = Completion of plan	No	Yes
Parks Master Plan	Master plans for parks and park systems. May include maps, drawings, photographs, and reports.	Superseded	No	Yes
Parks Program Files	Records relating to programs, events, and activities.	Creation + 3 years	No	No
Parks Reservation Requests, Rental Agreements, Use Permits, and Contracts	Permits, agreements, and contracts for the use of parks, shelters, and facilities.	Event + 3 years; Event = Date of reservation	No	No
Parks Supervisors Daily Report of Work Completed	Summarizes progress made on a particular job, noting the time required, employees assigned and vehicles used.	Creation + 2 years	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Payrolls and Payroll Registers	Payroll listings showing gross and net pay, and deductions. Referred to on questions of back pay and income taxes.	Creation + 4 years	No	No
Pension and Employee Benefit Records	Plan documents, reports, information used to compile reports	7 years after creation	No	No
Permits, General	Permits for public space usage. Includes, but not limited to, burning, street usage, and parking permits.	Creation + 5 years	No	No
Personal Files of Senior Level or Elected Official	Subject files (paper and electronic) of senior level staff such as department heads and elected officials.	Event + 6 months; Event = Separation from position/end of term	No	Yes
Personal Property Statements	Statements filed with local assessor declaring taxable personal property.	Creation + 5 years	Yes Confidential per Wis. Stat. §70.35(3)	No
Personnel Files	All records relating to an employee's employment by the City, not categorized elsewhere	7 years after termination of employment	No	No
Petitions	Petitions submitted to municipalities for improvements or changes to existing municipal services/structures.	Event + 7 years; Event = Petition approved or denied	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Physical Plant Monitoring and Inspection Reports	Records documenting the operation of all facets of facilities: VAC; plumbing, mechanical, electrical, structural as well as special monitoring of building components.	Creation + 6 years	No	No
Poll (Voter) Lists	List compiled by election officials on election day showing the names and addresses of electors who actually cast votes in an election defined in Wis. Stat. §5.02(14). Authority provided by Wis. Stat. §7.23(1)(e).	Event + 22 months; Event = Election	No	No
Preliminary Plats	Created during the development of subdivisions.	Event; Event = Superseded by final plat	No	No
Press Releases	Information about municipality programs and events.	Creation + 3 years	No	Yes
Proclamations	Proclamations issued by the mayor, commissioner, or elected executive on behalf of the municipality.	Event + 1 year; Event = End of elected representative's final term	No	Yes
Profile and Grade Books	Documentation of landscape and features.	Permanent	No	

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Project Records	All documents pertaining to a project including, design and construction contracts, proposed and approved amendments to all contracts, bidding plans and specifications, details on materials used on each project, and all other related project materials. Use for buildings, streets, sewers, sidewalks, etc.	Event + 10 years; Event = Date project is completed	No	No
Project Records (Historically Significant)	Use for historically significant projects.	Event; Event = Life of structure	No	Yes
Property Survey Records	Includes field notes, benchmark books, and section corner monument logs.	Permanent	No	
Property Tax Escrow Account List	List of real estate taxes paid directly from an escrow account.	Event; Event = Superseded	No	No
Property Taxation Exemption Reports	Reports filed by individuals who own property exempt from personal property tax under Wis. Stat. §70.11. The reports are submitted to the clerk of the taxation district. Authority provided by Wis. Stat. §70.339.	Creation + 10 years	No	No
Report of Special Assessment	Report of project that includes plans, specifications, cost estimates, and property affected. See Wis. Stat. §66.0703(5) for more information. Authority provided by Wis. Stat. §66.0703(5).	Creation + 2 years (provided report is on file with public works project record)	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Requests for Bids or Proposals	Records pertaining to the procurement of all commodities and services which may require a contract. This includes both successful and unsuccessful bids.	Event + 6 years; Event = End date of resulting contract or cancellation date of contract or bid/proposal	Yes Some information may qualify for Trade Secret protection per Wis. Stat. §19.36(5).	No
Resolutions	Official records pertaining to resolutions passed by municipalities.	Permanent	No	
Sales of Facilities and/or Land	Includes appraisals and related valuations. Projects where a municipality plans or actually sells either facilities and/or land assets.	Event + 6 years; Event = date of the completion of the transaction	No	No
Sewer Inspection Records	Indicates problems such as cracked or broken pipes, improper alignment, or loose lateral connections.	Event; Event = Superseded	No	No
State Highway Aids Program Records	Records of state aid pertaining to road maintenance.	Creation + 7 years	No	No
Street and Sidewalk Operations File	Documentation of the performance of tasks related to street and sidewalk maintenance. This may include solid waste management, street cleaning, repairs, snow removal, and garbage collection.	Creation + 7 years	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Special Assessments Final Resolution	Final authorization of special assessments. Authority provided by Wis. Stat. §66.0703(8)(d).	Permanent	No	
Special Assessment Payment Register	Record of the receipt of scheduled special assessment payments.	Event + 7 years; Event = Final collection of payments	No	No
Special Assessment Preliminary Resolutions	Issued by municipal district describing the purpose of the project, calculations, limits of assessment district, and number of installments to be paid. Authority provided by Wis. Stat. §66.0703(4).	Creation + 2 years (provided report is on file with public works project record)	No	No
Statement of Taxes	Combined record of calculations used to set final property taxes.	Permanent	No	
Surveillance Recordings	Monitoring and surveillance recordings for public buildings, street cameras, and public transportation. Does not apply to footage recorded by police body cameras, patrol dashboard cameras, or any similar police recording device.	Event + 121 days Event = Date of recording Recordings subject to process (open records requests, litigation, etc.) must be kept	No	No
Tax Calculation Support Records	Any record used to calculate municipal taxes. These include any certificates, evaluations, levies, estimates, payments, and credits used to determine real and personal property tax rolls.	Event + 7 years; Event = Audit	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Tax Receipts	Receipts issued by treasurer upon payment of property taxes. Includes any supporting documents associated with issuing and recording receipts of payments.	Event + 7 years; Event = Audit of records by outside accounting firm	No	No
Tax Settlements	Used to verify tax collections compared to the taxes levied in the municipal records.	Event + 7 years; Event = Audit	No	No
Title Documentation	Records documenting the title of land owned by the municipality including the abstract and certificate of title, opinions of title, and title insurance policies.	Permanent	No	
Transit Accessible Boarding Reports	Reports documenting the accessibility of vehicles.	Creation + 5 years	No	No
Transit ADA Customer Eligibility Files	Files determining the eligibility of customers for ADA transit programs.	Event + 6 years; Event = Termination of service or participation by customer	Yes Patient health information may be protected by Wis. Stat. §146.82	No
Transit Dispatch Files	Boarding and alighting, extra board weekly projections and assignments, daily work schedules, and bid mark-ups.	Creation + 7 years	No	No
Transit Fare Information Files	Research, background, studies, and other materials used to determine fares.	Creation + 7 years	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Transit Operation Reports	Daily, weekly, or other periodic reports summarizing transit system operations and ridership and lost and found reports.	Creation + 3 years	No	No
Transit Operator Assignment Records	Documentation of assignment of individual operators to routes and shifts.	Creation + 3 years	No	No
Uncategorized Records	Records that do not fall under any other category.	Creation + 7 years	No	Yes
Unpaid Tax Statements	List of postponed real property, delinquent real property, and delinquent personal property taxes.	Creation + 15 years (Retain with tax roll)	No	No
Vehicle Leases	Leases of motor vehicles and other motorized equipment	7 years after expiration	No	No
Vehicle Use Agreements	Agreements between individuals and municipalities required before driving a municipal owned vehicle.	Event + 1 year; Event = termination of agreement or employment	No	No
Vehicle Inspection Reports	Inspections of municipal vehicles.	Event + 1 years; Event = date the vehicle is disposed	No	No

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Vendor Qualification Files	Documentation of vendors and contractors who fail to meet the terms and specifications of purchasing contracts.	Event + 6 years; Event = End of contract	No	No
Water and Sewer Line Inspections	Records documenting the inspection of water and sewer lines.	Permanent	No	
Water and Sewer Main Break Records	A record documenting the history of breaks in water and sewer main lines.	Permanent	No	
Water, Storm, and Sanitary Sewer Main Maps	Maps providing the location of water, storm, and sanitary sewer mains. Also provides information about the depth, slope, size and composition of these features.	Permanent	No	
Water Utility Current Billing Receipts, Customer Ledgers, Water Stubs	Records of utility customer payments. Also consult PSC retention schedules for public utilities.	Creation + 2 years Wis. Stats. §19.21(4)(b)	No	No
Zoning Appeals, Approved	Material submitted to appeal a zoning decision. May include maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Permanent	No	

Record Type	Record Description	Retention Period	Confidential?	WHS Notification?
Zoning Appeals, Disapproved	Material submitted to appeal a zoning decision. May include maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Event + 7 years; Event = Final appeal is closed	No	Yes
Zoning Board and Zoning Board of Appeals Meeting Material	Agendas, minutes, reports, plans, and other material submitted to the Zoning Board, and/or Zoning Board of Appeals.	Permanent	No	
Zoning Ordinance	The text of the zoning ordinance spells out uniform rules that apply to each zoning district including: uses of the land (permitted, conditional and prohibited uses), dimensional standards (lot size, frontage, setbacks, building height, bulk, floor area), and the density of development. Authority provided by Wis. Stat. §60.61.	Permanent	No	
Zoning, Rezoning Files	May include, but is not limited to, maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Permanent	No	
Zoning Variance Files	Records related to area and use variances. Documentation submitted by landowners to secure a variance to the zoning ordinance.	Permanent	No	