

ORDINANCE NO. 2014-14

Records Retention Ordinance

Executive Summary

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

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

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

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

B. Definitions. As used in this ordinance:

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

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

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

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

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

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

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

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

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

s/Jim Schroeder
Jim Schroeder
Chair

ATTEST:

s/Barbara A. Frank
Barbara A. Frank, County Clerk

Published this 16th day of June 2014.



JEFFERSON COUNTY
OFFICE OF THE COUNTY
ADMINISTRATOR

320 S. Main Street Room 111
Jefferson, WI 53549
Telephone (920) 674-7101

GARY R. PETRE
County Administrator

TAMMIE J. JAEGER
Administrative Assistant
Confidential

MEMO

TO: Department Heads

FROM: Gary R. Petre, County Administrator

DATE: June 12, 2009

SUBJECT: Records Retention Schedules and Procedures

Attached is a copy of the State approved Records Retention Schedules for County departments. The effect of these approved schedules is that County departments are now authorized to dispose of records, based on the approved schedules.

Also attached is a copy of a Records Retention Procedure that was drafted to assist departments in implementing the records destruction process.

Please review the attached schedules to make sure that you agree with those pages pertaining to your department. Also, please review the attached procedure. Let me know if you think there are any changes that you would like to make or if you have any questions relative to these attachments.

Thank you,

A handwritten signature in cursive script that reads "Gary R. Petre".

Gary R. Petre
County Administrator



JEFFERSON COUNTY
OFFICE OF THE
COUNTY ADMINISTRATOR

GARY R. PETRE
County Administrator
TAMMIE J. JAEGER
Administrative Assistant
Confidential

June 10, 2009

Records Retention Procedure

I. Purpose

To establish a County-wide records retention schedule and authorize destruction of County records pursuant to that schedule on an annual basis.

II. Scope

All departments and divisions within County government.

III. Records Retention

The records retention procedure establishes a perpetual disposal plan for all records. Records retention schedules indicate the retention of each form and type of record in current use. Decisions are made and recorded whether to destroy or hold records, and also for how long they should be retained. The decision rests on several factors:

1. Federal regulations, State statutes and County codes and ordinances
2. Requirements of good management and public relations
3. Availability of the same information from other records
4. Historical value

IV. Records Retention Schedules

- a. The purpose of the schedules included in this procedure is to establish retention periods and authorize destruction of County records according to that schedule on an annual basis.
- b. It is the responsibility of each department head to inform the County Administrator of any changes in schedules when new record types, forms and/or reports are created.
- c. All changes to records retention schedules will be completed by the County Administrator's staff.
- d. The County Administrator will obtain approval of revised schedules from the County Corporation Counsel, the Wisconsin State Historical Society and the State Public Records Board.

V. Records Destruction

- a. It is the responsibility of the department head to review records and authorize and complete their destruction according to the approved retention schedules on, at least an annual basis.

Records Retention Procedure

- b. Records will be destroyed by shredding, either using on-site equipment or by contracting with an outside vendor.
- c. Department heads do not have the authority to destroy records prior to the established retention period.
- d. The State Historical Society of Wisconsin (SHSW) has waived the required statutory sixty day notice for the records marked with a **W**. The SHSW must be notified prior to the destruction of records marked **N**, designating non-waiver.
- e. **Destruction after Request for Inspection:** No requested record may be destroyed until after the request is granted or sixty days after the request is denied. If an action is commenced under Sec. 19.37, Wis. Stats., the requested record may not be destroyed until a court order is issued and all appeals have been completed. (See Sec. 19.35(5), Wis. Stats.)
- f. **Destruction Pending Litigation:** No record subject to pending litigation shall be destroyed until the litigation has been resolved.

Jefferson County Records Retention Schedule				
Department: General Schedule (Records typically found throughout the County)				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Agendas	W		1	YES
Agreement, Labor	W		C	
Agreement, Maintenance	W		LOP	
Annual Report, County	W		3	
Annual Report, 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	
Benefit Bank Balance	W		S	
Bids, Successful	W	WI Stats 59.52(4)(a)(10)	7	YES
Bids, Unsuccessful	W		1 AA	YES
Bids Pending Log	W		1 M	YES
Bids, Working Papers	W		1	YES
Billings, Department Backup	W		2	
Blank Forms	W		S	
Blueprints / Drawings - County Facility	W		C	
Budget, Capital Projects	W		2	

Jefferson County Records Retention Schedule				
Department: General Schedule (Records typically found throughout the County)				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Budget, Departmental Operating	W		2	
Budget, Departmental Working Papers	W		2	
Budget, Jefferson County	W		3	
Business Continuity Plan	W		S	
Business Continuity Plan, Working Papers	W		S	YES
By-Laws	W		S	
Calendars	W		C	YES
Cash Register Tapes	W		7	YES
Chart of Accounts Object Codes - Jefferson County	W		S	
Checks, Cancelled / Voided	W	WI Stats 59.52(4)(a)(16)	7	
Check Copies	W		7	
Check Registers	W		7	
Code of Ethics - Jefferson County	W		S	
Computer Service Request Form (completed)	W		1	
Contracts / Agreements	W	WI Stats 59.52(4)(a) (10)	7 AT	
Correspondence, General	W		1	
Directory Information	W		S	
Employee Attendance Records	W		3	YES
Fixed Assets	W		S	

Jefferson County Records Retention Schedule				
Department: General Schedule (Records typically found throughout the County)				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
General Receipts	W		1	
Historical Records	N		P	
Indexes	W		C	
Inventory, Equipment	W		S	
Invoices, Accounts Receivable	W		3	YES
Invoices, Accounts Payable	W		C	
Leases	W		7 AT	
Legal Opinions	W		10	
Mailing Lists	W		S	YES
Maintenance Agreements	W		S	YES
Maintenance Service Request Form	W		C	
Maintenance Service Request Form (Completed)	W		1	
Manual Warrants	W		3	
Manuals, Equipment	W		LOP	
Material Safety Data Sheets	W	WI Stats 101.583 (1)(a)	30	YES
Minutes - Commissions and Boards	W		7	
Minutes, Committee / Meeting	W		7	YES
Minutes, County Board	W		7	YES
Minutes, Meetings	W		7	YES

Jefferson County Records Retention Schedule				
Department: General Schedule (Records typically found throughout the County)				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Ordinances and Resolutions	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	
Personnel, Grievances	W		7	
Personnel, Job Descriptions	W		S	
Personnel, Performance Tracking (Evaluations)	W		7 AT	
Personnel, Time Sheets	W		2	YES
Policy and Procedure Manuals	W		S	
Purchase Orders (PO)	W		C	YES
Purchase Orders, Blanket	W		C	YES
Purchase Release Payment Authorization (PRPA)	W		3	
Purchase Requisitions	W		C	
Receipts, Cash (Received and issued)	W	WI Stats 59.52(4)(a)(12)	4	YES

Jefferson County Records Retention Schedule				
Department: General Schedule (Records typically found throughout the County)				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Records Retention Schedules	W		S	
Reference Materials (Books, magazines, pamphlets, brochures, newsletters, etc.)	W		S	
Reports, Routine	W		1	YES
Requests for Bids (RFB's)	W	WI Stats 59.52(4)(a)(10)	1	
Requests for Information (RFI's)	W	WI Stats 59.52(4)(a)(10)	1	
Requests for Proposals (RFP's)	W	WI Stats 59.52(4)(a)(10)	1	
Requests for Proposals	W	WI Stats 59.52(4)(a)(10)	7	YES
Requests for Proposals, Reviews	W		3	
Service Receipts	W		2	YES
Specifications, Working Papers	W		S	
State Grant Information	W		S	
Studies - Drafts	W		7	YES
Studies - Final draft	W		7	
Study, Job Evaluation	W		S	
Supply Orders	W		C	YES
Telephone Logs	W		C	
Telephone Service Request Form	W		C	
Training Class Notes	W		S	
Vehicle Replacement Plan	W		S	

Jefferson County Records Retention Schedule				
Department: General Schedule (Records typically found throughout the County)				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Vendor Catalogs	W		S	
Vendor Codes	W		S	
Vendor Product Safety Data	W		C	
Vendor Service Agreements	W		S	
Warranty Records	W		LOP	YES
Historical Society Codes		Retention Codes		
N = Notify W = Waived NA = Not Applicable		AA = After Audit	EVT = Event Date	
IMPORTANT NOTE: 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	

Peter Bellis
State Archivist

DEC 02 2008

[Signature]
Executive Secretary

12/9/08

APPROVAL SUBJECT TO 10-YEAR
SUNSET. RESUBMITTAL REQUIRED
PRIOR TO November 2018

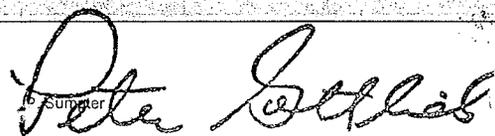
Jefferson County Records Retention Schedule				
Department: Clerk - Accounting				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
1099 Data	W		10	YES
Benefit Bank Balance	W		10	YES
Billings, Department Backup - Finance	W		7	YES
Cash Receipts	W	State PRFB (Rev. 5/92) 90006	7	YES
Check Copies	W	State PRFB (Rev. 5/92) 90013	7	YES
Check Registers	W		7	YES
County Payroll Tax Records	W		10	
Cost Allocation Plan	W		7	YES
Debt Service	W		7	YES
Deferred Compensation Payments	W	State PRFB (2/15/95) 90209A	10	YES
Deposits	W	State PRFB (Rev. 5/92) 90012	7	YES
Edit Reports	W		1	
Employee Payroll Document Case Records	W	State PRFB (2/15/95) 90214	EVT + 5	YES
Historical Society Codes		Retention Codes		
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<p>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</p>				

Department: Clerk - Accounting				
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
Personnel, Expenses	W		7	YES
Personnel, Time Sheets (All County Employees)	W		7	YES
Petty Cash Files	W		7	YES
Purchase Release Payment Authorization	W	State PRFB (Rev. 5/92) 90007	7	YES
Quarterly Status Reports	W		7	YES
Historical Society Codes		Retention Codes		
N = Notify W = Waived NA = Not Applicable		AA = After Audit EVT = Event Date		
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IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).				

Department: Clerk - Accounting				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Reconciliations, Working Papers	W	State PRFB (Rev. 5/92) 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
Void Check Files	W		1	YES
Wage Assignment Coupon Books	W		10	YES
Withholding Certificates, Employee Wage and Tax Statements (W-2 Reports)	W	State PRFB (2/15/95) 90209	15	YES
Historical Society Codes		Retention Codes		
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IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).				

Department: Clerk - Accounting				
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) 90000	4	YES
Internal Fiscal Correspondence, Memos, Policy & Procedures, and Reports, Working Papers	W	State PRFB (Rev. 5/92) 90000A	1	YES
Mileage Logs - Monthly	W		7	YES
Non-Routine Financial Reports and Studies	W	State PRFB (Rev. 5/92) 90003	7	YES
Non-Routine Financial Reports and Studies, Working Papers	W	State PRFB (Rev. 5/92) 90003	S	YES
State Fiscal Policies and Procedures Records (Official)	W	State PRFB (Rev. 5/92) 90001	10	
State Fiscal Policies and Procedures Records, Updates and Working Papers	W	State PRFB (Rev. 5/92) 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	
Historical Society Codes		Retention Codes		
N = Notify W = Waived NA = Not Applicable		AA = After Audit EVT = Event Date		
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APPROVAL SUBJECT TO 10-YEAR
Jefferson County Records Retention Schedule SUBMITTAL REQUIRED
PRIOR TO November 2018


 Peter Schell
 State Archivist

DEC 02 2008


 Executive Secretary

Jefferson County Records Retention Schedule				
Department: County Administrator				
Record Title	State Code	Authority	Retention Years - Plus Current 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 N = Notify W = Waived NA = Not Applicable		Retention Codes		
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Peter Lethbride DEC 02 2008
 State Archivist

[Signature] 12/9/08
 Executive Secretary

APPROVAL SUBJECT TO 10-YEAR
 SUNSET. RESUBMITTAL REQUIRED
 PRIOR TO November 2018

APPROVAL SUBJECT TO 10-YEAR
SUNSET. RESUBMITTAL REQUIRED
PRIOR TO November 2018

Jefferson County Records Retention Schedule

Department: Central Services

Record Title	State Code	Authority	Retention Years - Plus Current Year	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

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.).

Retention Codes

AA = After Audit EVT = Event Date
 AS = After Settlement LOP = Life of Product
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 EOY = End of Year V = Vital

Peter Bethel
State Archivist

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Ally 12/9/08
Executive Secretary

Jefferson County Records Retention Schedule Approved: November 24, 2008

Department: Child Support

Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Child Support Case Records	W	45CFR 303.11d	7	YES
Child Support Divorce	W		7	
Child Support Expenditure Reports and Support Documentation	W	45 CFR 74.20-74.25	3	
Child Support Records of Required Client Notification	W	46 CFR 74.20-74.25	3	
Child Support Statistical Reports and Supporting Documentation	W	45 CFR 74.20-74.25	3	
Client Assistance (Out of County)	W		7	
Client Listing (Computer Printout)	W		3M	
Client Logs	W		C	
IRS Records List	W		7	
Misdemeanor and Felony Support Files	W		After closed and entry of judgment or divorce or entry of final order + 7	
Paternity Files, Post Judgments	W		Closed date +7	YES
Paternity Files, Pre-Judgments, Dismissed	W		3	
Paternity, Pre-Judgments Not Pursued	W		3	
Reciprocal Support Cases (Interstate Cases - i.e., UIFSA, URESA)	W		7	
Warrants and Capias	W		3	YES

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

[Signature] 12/9/08
Executive Secretary

Peter Gellies
State Archivist

DEC 15 2008 APPROVAL SUBJECT TO 10-YEAR SUNSET. RESUBMITTAL REQUIRED PRIOR TO November 2018

APPROVAL SUBJECT TO 10-YEAR
 SUNSET. RESUBMITTAL REQUIRED
 PRIOR TO November 2018

Jefferson County Records Retention Schedule				
Department: Coroner				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Case Billing	N/A		10	YES
Case Face Sheet Logs	N/A		P	YES
Case Files	W		75	YES
Case File Slides	W		75	YES
Cremation Case Files	N/A		P	
Case File X-rays	W		75	YES
Case Index, Monthly (digital)	W		5	YES
Case Photos and DNA Card	N/A		75	
Coroner Annual Report	W		p	YES
Inventory - Equipment			S	YES
Medication Disposal Log	N/A		10	YES
Report for Final Disposition (Other reportable)	W		3	
WCMEA Materials			S	
Historical Society Codes		Retention Codes		
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IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).				

Peter Bellis DEC 02 2008
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Alamy 12/9/08
 Executive Secretary

Jefferson County Records Retention Schedule				
Department: Corp Counsel - Legal				
Record Title	State Code	Authority	Retention Years - Plus Current Year	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
CHIPS (Child in Need of Protective Services) Juvenile Records	W		18th birthday + 24	
Client Collection Files	W		10	
Client Index Cards	W		5	
Department Files			EVT + 4	
Dismissals-51.45	W		EVT + 7	
Guardianship Files - Protective Placements	NA	SCR 7201 (33)	Termination of guardianship + 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	
Historical Society Codes		Retention Codes		
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Jefferson County Records Retention Schedule				
Department: Countryside				
Record Title	State Code	Authority	Retention Years - Plus 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	
Payroll	W		3-6 years	
Paroll Documents Subjet to IRS Audit	W		10+	
Performance Evaluations	W		6AT	
Personnel Policies	W		P	
Rate Schedules, benefit or pension summaries	W		6	
Age Discrimination Act Documents	W		1AT	
Civil Rights Act, ADA Documents	W		1AT	
Equal Pay Act Documents	W		6	
Social Security Reports, W-4 Forms, W-2 Forms	W		6	
Staffing Schedules/Vacation Listings	W		3-6 years	

Jefferson County Records Retention Schedule				
Department: Countryside				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Union Contracts	W		P	
Worker's Compensation Documents	W		12	
I-9 Forms	W		3+	
Bank Deposits, Cancelled Checks, Reconciliations	W		3	
Bank Statements	W		8	
Cash Receipts, Deposits, Receipt Books	W		10	
Correspondence (Credit, Collections, Insurance)	w		6	
General Ledger	W		P	
Invoices (AP and AR)	W		6	
Journals & Ledgers (General)	W		P	
MA Level of Care Approvals	W		3	
MA Eligibility , Billings to MA, Medicare	W		6	
Medicare/Medicaid Cost Reports	W		7	
Medicare EOMB's/MA RAs	W		7	
Medicare Secondary Payer	W		10	
Petty Cash	W		3	
Resident Bank & Fund Closing Statements	W		3	
Withdrawal Slips/Logs (Residents)	W		10	
Food Costs	W		5	

Jefferson County Records Retention Schedule				
Department: Countryside				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Meal Counts	W		5	
Manus, Therapeutic Diets	W		3	
Blueprints	W		P	
Building Maintenance & Repair	W		10	
Calibration	W		6	
Equipment, FPA Standards	W		LOP+6	
Equipment Maintenance	W		5	
Inspection - Building & Grounds	W		3	
Maintenance Log	W		6	
Work Orders	W		3	
Appointment Schedules	W		3	
Communicable Disease Reports	W		3	
Controlled Substance Records (Inventory, Orders, Administration)	W		3	
Correspondence - Resident	W		6	
Daily Census Reports	W		6	
Disease Index, Resident Index, Admission/Discharge Registers, Statical Reports	W		P	
Incident Reports	W		3	
In-service, Orientation programs, Attendance	W		3	
MDS Data Collection	W		18M	

Jefferson County Records Retention Schedule				
Department: Countryside				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
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 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.).		Retention Codes 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 EOY = End of Year V = Vital		

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APPROVAL SUBJECT TO 10-YEAR
 SUNSET. RESUBMITTAL REQUIRED
 PRIOR TO November 2018

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PRIOR TO *November 2018*

Jefferson County Records Retention Schedule				
Department: District Attorney				
Record Title	State Code	Authority	Retention Years - Plus Current Year	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) Class A or B felonies	YES
Misdemeanor Cases	W	WI Stat 978.07 (1)(a)(1)(b)	EVT+3	YES
News Releases	w		DA Discretion	
Search Warrants	W	978.07(1)(d) absent case file	6	
Subpoena duces tecum		978.07(1)(d) absent case file	6	
Historical Society Codes		Retention Codes		
N = Notify W = Waived NA = Not Applicable		AA = After Audit	EVT = Event Date	
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IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).				

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Jefferson County Records Retention Schedule				
Department: Economic Development				
Record Title	State Code	Authority	Retention Years - Plus Current Year	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			7AS	YES
Sub Grantee Project Files - CDBG (Community Development Block Grant)	W		7	
Sub Grantee Project Files - HOME	W		7	
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, microform, etc.).		Retention Codes 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 EOY = End of Year V = Vital		

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APPROVAL SUBJECT TO 10-YEAR
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 PRIOR TO November 2018

Jefferson County Records Retention Schedule				
Department: Emergency Management				
Record Title	State Code	Authority	Retention Years - Plus Current Year	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	
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APPROVAL SUBJECT TO 10-YEAR
 SUNSET. RESUBMITTAL REQUIRED
 PRIOR TO November 2018

Jefferson County Records Retention Schedule				
Department: Fair Park				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Advertising	W		5	YES
Camping Registration (Fair Week)			3	YES
Camping / Miscellaneous Fees	W		3	YES
Data Backup			5	YES
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	

Jefferson County Records Retention Schedule				
Department: Fair Park				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
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		
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APPROVAL SUBJECT TO 10-YEAR SUNSET. RESUBMITTAL REQUIRED, PRIOR TO November 2018

Jefferson County Records Retention Schedule

Department: Health - Administration

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

Historical Society Codes	Retention Codes
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Jefferson County Records Retention Schedule				
Department: Human Resources				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
<i>Employment Records</i>				
Classification Questionnaire	W		C+1 Previous	YES
Commercial Driver's License	W		P	YES
Drug Policy	W		S	YES
Drug Testing	W	29 CFR 1910.20	30 AT	YES
Employee Index Card File	W		P	YES
Employee Layoffs, Subcontracting Notes, Promotions, Demotions and Transfers	W	PRB Ltr. 11/30/99	6	YES
Employee Needs Assessment Evaluation Report	W		3	YES
Employee Orientation	W		C	YES
Employee Medical History File	W	29 CFR 1630.14	13 AT	YES
Employee Recognition	W		3	YES
Employee Seasonal Terminations	W	PRB Ltr. 11/30/99	6	YES
Employee Service Records	W		10 AT	YES
Employee Unemployment Compensation Benefit Files	W		3	YES
Employment Bid List, Internal Applicants	W		S	YES
Equal Employment Opportunity Commission (EEOC) Report	W		5	YES
Exams, Written	W		2	YES
Exam Scores	W		2	YES
I-9 Immigration Logs	W	U.S. Department of Justice Handbook	EVT + 3	YES

Jefferson County Records Retention Schedule				
Department: Human Resources				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Loan Verifications	W		3 M	
New Hire Reports			?	
Organizational Charts	W		S	YES
Personnel, Applications (Not Hired)	W	PRB Ltr. 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 (closed	W		10	YES
Training and Development Attendance Log	W		C	YES
Training and Development Programs	W		C	YES
Training Library Log	W		C	YES
Benefits				
Employee Cobra Benefits	W		Life of Insured	YES
Employee Master Benefits File	W		3	YES

Jefferson County Records Retention Schedule				
Department: Human Resources				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Employee Temporary - WRS600	W		P	YES
Insurance History, Health	W		3	YES
Open Enrollment, Health Plan				
Proposals, Voluntary Benefits	W		S	
Seniority Report	W		10	YES
Temporary Total Disability (TTD) Reports	W		7	YES
<i>Negotiations</i>				
Union Contract and Collective Bargaining	W	29 USC 436	P	YES
Union Correspondence	W	29 USC 436	5	YES
Union/Non-union Grievance Files, After Settlement	W		P	YES
Wage Surveys	W		5	YES
<i>Risk Management</i>				
Certificates of Insurance	W		7AT	YES
Employee Worker's Compensation, Closed	W		13AT	YES
Employee Worker's Compensation, Open	W		13AT	YES
Employee Worker's Compensation Blood Born Pathogens	W		30AS	YES
Employee Worker's Compensation, Blood Born Pathogens - Closed	W	29 CFR 1910.1030	30AT	YES
Employee Worker's Compensation Loss Analysis Report (GAB), Monthly	W		C	YES
Incident Claim Reports	W		7	YES

Jefferson County Records Retention Schedule				
Department: Human Resources				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Loss Control Reports	N/A		P	YES
OSHA 200 Log	W	29 CFR 1904.6	5	YES
Historical Society Codes N = Notify W = Waived NA = Not Applicable		Retention Codes		
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APPROVAL SUBJECT TO 10-YEAR
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Jefferson County Records Retention Schedule				
Department: HS - Senior Services				
Record Title	State Code	Authority	Retention Years - Plus Current Year	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	5	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
Congregate Registration Forms *	W		7	YES
Elder Abuse Reports	W	WI Stats 46.90	7	YES
Historical Society Codes		Retention Codes		
N = Notify W = Waived NA = Not Applicable		AA = After Audit	EVT = Event Date	
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Jefferson County Records Retention Schedule				
Department: Land & Water Conservation				
Record Title	State Code	Authority	Retention Years - Plus Current Year	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			P	
Equipment Maintenance			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			7	
Interdepartmental Agreements			S	
Land and Water Resource Management Plan (LWRM)			P	

Jefferson County Records Retention Schedule				
Department: Land & Water Conservation				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Land Conservation Grants			7	
Maps - Townships	N/A		P	YES
Maneuve Storage Permits			7	YES
Memoranda of Understanding			7AT	YES
Non-metallic Mining Permit Files			P	
Soil Interpretation Records (SIRS)	W		S	YES
Soil Stewardship			7	YES
Soil Transect Survey			7	YES
Tree Seedling Sale			7	YES
USDA (U.S. Department of Agriculture) Receipts & Expense Documentation	W		3	
Watershed Control Plan Projects	W		7	
Wetland Maps	N/A		P	
Historical Society Codes N = Notify W = Waived NA = Not Applicable		Retention Codes		
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APPROVAL SUBJECT TO 10-YEAR
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 PRIOR TO November 2018

Jefferson County Records Retention Schedule				
Department: Land Information & Surveyor				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Accident Reports, Employee	W		7 AT	
Address Assignments		Jefferson County Uniform Numbering Ordinance	P	YES
Aerial Photographs			P	
Assessment & Tax Role Manufacturing			2	
Board of Review Changes			5	YES
Cadastral Maps			P	YES
Corner Tie Sheets			P	YES
Employee Emergency Informational Form			S	
Field Notes			P	YES
Grants			10	
High Precision Geodetic Control Network			S	YES
Land Information Plan, Jefferson County			P	YES
Managed Forest Land Index		WI Stats 77.16 (3), (7), (9)	5	
Map Projects - Special			S	YES
Map - Official Jefferson County			S	YES
Maps - Highway Relocation			P	
Maps - Railroad			S	
Maps - Town Address		Jefferson County Uniform Numbering Ordinance	P	YES
Mill Rate Worksheets			5	YES

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PRIOR TO November 2008

Jefferson County Records Retention Schedule				
Department: Land Information & Surveyor				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Parcel Mapping Documentation			10	YES
Payment Voucher	W		7	
Personnel, Seasonal Interns	W		7 AT	
Plat Books			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			5	
Surveys for County Departments			P	YES
Wisconsin Land Technical Publications			S	
Historical Society Codes N = Notify W = Waived NA = Not Applicable		Retention Codes		
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Jefferson County Records Retention Schedule				
Department: MIS				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Fiber Network Diagram			C	Yes
Network Diagram			C	Yes
Backup Procedures			C	Yes
Class Schedule			C	Yes
Contractor Recommendations			7	Yes
Contract Correspondence			7	Yes
Course Evaluations			C+1	Yes
Customer Satisfaction Survey			1	Yes
Job Responsibility List			C	Yes
Computer Inventory			C	Yes
Written Backup Log			7	Yes
Backup (Imaging, Email, Misys, ECS, Home drive, Network shared, departmental, Network sheared, county-wide, Jeffdc1, Jeffdc2, Firewall, Wisacwis, CHEMS, All others not stated)			7	Yes
Backup (Jeffutil, Jeffutil2, Web server, Employee web page, Jeff-avotus/sql (telephone records), Switch backup)			1	Yes
Historical Society Codes		Retention Codes		
N = Notify W = Waived NA = Not Applicable		AA = After Audit EVT = Event Date		
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Jefferson County Records Retention Schedule				
Department: MIS				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Bacup (Voicemail, Phone system, Outlook web access, Security camera images)			30 days	Yes
AS400 Backups				
Quarterly			5	Yes
Daily			60 days	Yes
Data Bases Section Withdrawn				
.MySQL			60 days	Yes
.DB2			60 days	Yes
.Access			60 days	Yes
.Oracle light			60 days	Yes
PC Ghost Images			C	Yes
Software Licensing List			7	Yes
MIS Disaster Recovery Plan			C	Yes
HIPAA Securty Enterprise Assessment			C	Yes
MIS Security Procedures			C	Yes
MIS Security Audits			7	Yes
Historical Society Codes		Retention Codes		
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Jefferson County Records Retention Schedule				
Department: Parks				
Record Title	State Code	Authority	Retention Years - Plus Current Year	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	
Historical Society Codes		Retention Codes		
N = Notify W = Waived NA = Not Applicable		AA = After Audit EVT = Event Date		
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Jefferson County Records Retention Schedule				
Department: Parks				
Record Title	State Code	Authority	Retention Years - Plus Current Year	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 - MF-003 (R 10-97)	4	YES
Log, Maintenance / Patrol Trails	W		7	YES
Log, Well Data	W		LOP	YES
Park and Open Space Master Plan	N		P	YES
Park System Work Logs	W		3	YES
Park Ordinance Citations	W		6	YES
Permits - Shelter rental	W		3	YES
Plans / Construction Documents / Specifications / As Builts / Drawings	W		LOP	YES
Historical Society Codes		Retention Codes		
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		EOY = End of Year V = Vital		

APPROVAL SUBJECT Approved: November 24, 2008
 SUNSET. RESUBMITTAL REQUIRED
 PRIOR TO November 2018

Jefferson County Records Retention Schedule				
Department: Register in Probate				
Record Title	State Code	Authority	Retention Years - Plus Current 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
Historical Society Codes		Retention Codes		
N = Notify W = Waived NA = Not Applicable		AA = After Audit	EVT = Event Date	
IMPORTANT NOTE: 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	

Peter Bellis
 State Archivist DEC 02 2008

[Signature] 12/9/08
 Executive Secretary

Jefferson County Records Retention Schedule				
Department: Register of Deeds (From SHSW Schedule)				
Record Title	State Code	Authority	Retention Years - Plus Current Year	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 savings bank to a stock savings bank	N/A	s. 214.685 (5)	P	YES
Certified survey map and corrections of	N/A	s. 236.34 (1), 236.295 (1)	P	YES
Chattel mortgages	N/A	None	P	YES
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

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

Jefferson County Records Retention Schedule				
Department: Register of Deeds (From SHSW Schedule)				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
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 judgement	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

Jefferson County Records Retention Schedule				
Department: Register of Deeds (From SHSW Schedule)				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
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	YES
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
Retraction 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				

Jefferson County Records Retention Schedule				
Department: Register of Deeds (From SHSW Schedule)				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
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 judgement 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

Jefferson County Records Retention Schedule				
Department: Register of Deeds (From SHSW Schedule)				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
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	N	s. 66.431 (9)(a)1, 66.431 (11)(b)	CR + 7 years	YES
Notice of removal of human corpse	W		2 months from date of death; Dept. H&SS directive	YES
Order to suspend proceedings for collection of property taxes of property owned by veterans	W	s. 45.53 (6)	CR + 7 years	YES
Raze order	W	s. 66.05 (1)(d)	CR + 7 years	YES
Report for final disposition of corpse	W		2 years from date of death; Dept. H&SS directive	YES
Treasurers receipts	W	CR + 2 years		YES
UCC filings (Fixture) 409.403 (6) 409.402 (5)	W	s. 409.403 (6), s. 409.402 (5)	EVT = satisfaction of mortgage	YES
UCC filings (Non-fixture)	W	s. 409.403 (3)	CR + 5 years	YES
UCC - 11, search copies	W		CR + 2 years	YES
Vital record, request for copy of	W		FIS + 1 year	YES
Wills, foreign; certificate of assignment	W	s. 868.05 (2)	CR + 7 years	YES
Wills, notice that proceedings have been taken to contest the will	W	s. 868.01 (3)	CR + 7 years	YES
Historical Society Codes		Retention Codes		
N = Notify W = Waived NA = Not Applicable		AA = After Audit	EVT = Event Date	
IMPORTANT NOTE: 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	
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		C = Current Only	P = Permanent	
		EOM = End of Month	S = Until Superseded	
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Peter Bellis
 State Archivist DEC 02 2008

[Signature] 12-9-08
 Executive Secretary

APPROVAL SUBJECT TO 10-YEAR
 SUNSET. RESUBMITTAL REQUIRED
 PRIOR TO November 2018

Jefferson County Records Retention Schedule				
Department: Sheriff				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
<i>Administration</i>				
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
Internal Investigation Files	W		8	YES
Overtime Cards	W		8	
Photostat Accounts	w		8	YES
Psychological Evaluations (Employee)	W		P	YES
Sheriff Sales, Calendar Log	W		8	YES
Sheriff Sales, Real Estate	W		8	
Warrants Teletypes / Municipalities	W		8	
Policy & Procedure Manual	W		S	YES
<i>Civil Process</i>				

Jefferson County Records Retention Schedule				
Department: Sheriff				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Civil Process Billings, Closed	W		8	YES
Civil Process Daily Ledgers	W		8	YES
Dockets, Civil	W		8	YES
Dockets	W		8	YES
Executions	W		8	YES
Foreclosures, Sheriff's Sales	W		8	YES
Injunctions	W		8	YES
Process Bookkeeping Records	W		8	YES
Process Invoices	W		8	YES
Restraining Orders	W		8	YES
Sheriff Sales, Real Estate	W		8	YES
Communications Center				
911 Phone Activity	NA		8	YES
Court Services				
Warrants	W		8	YES
Warrants, Cancelled	W		8	YES
Detective Bureau				
Citizen Complaints	W		P	YES
Incident Reports	W		P	YES

Jefferson County Records Retention Schedule				
Department: Sheriff				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Incident Reports, Juvenile	W		P	YES
Internal Investigation Files	W		P	YES
Tactical Call Files	W		P	YES
<i>Drug Unit</i>				
Asset Forfeitures	W		8	YES
Confidential Informant File	N/A		P	YES
Drug Tracks	W		8	YES
Evidence Destruction File	W		8	YES
Fleet Leased Contracts	W		8	
Gang Profile Intelligence Records	W		8	YES
Incident Reports	W		P	YES
Intelligence Request	W		P	YES
Known Offender File (KOF) Lawsuits	W		8	YES
<i>Huber Facility</i>				
Bank Deposits	W		8	YES
Bank Reconciliation's	W		8	YES
Cancelled Checks	W		8	YES
Cash Receipts	W		8	YES
Cell Check	W		8	YES

Jefferson County Records Retention Schedule				
Department: Sheriff				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Check Stubs	W		8	YES
Daily Inmate Roster	W	WI Adm. Code DOC 348.09(4)	8	YES
Electronic Monitoring Log	W		8	YES
Federal Billing	W		8	
Incident Reports	W		P	
Inmate Discipline Records	W	WI Adm. Code DOC 348.09(3)	8	YES
Inmate Incarceration Files	W		8	YES
Inmate Medical Records	W	WI Stats 146.81-146.83 and DOC 348.09(2)	8	YES
Jail Register	N		8	YES
Registration of Visitors	W	WI Adm. Code DOC 348.09(4)	8	YES
Stayed and Transfer Files	W		8	YES
Inmate Time	W		8	YES
Identification Bureau				
Auction Records	W		8	YES
Death Investigation Negatives, Sensitive in Nature	W		P	YES
Evidence, Major Cases	W		5	YES
Finger Print	W		P	
Incident Reports	W		P	
Jail Registers	N		8	

Jefferson County Records Retention Schedule				
Department: Sheriff				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Mug Shots	N/A		P	YES
Property Inventories	N/A		P	YES
Traffic Accident Photos	W		8	YES
<i>Jail</i>				
Bail Receipts	W		2	YES
Block Check Sheets	W		8	YES
Cancelled Checks, Jail	W		8	YES
Commissary Receipts	W		8	YES
Contract Employee Files	W		EVT + 5	
Critical Incidents (i.e. fire, assaults, suicide, etc.)	W		8	
Daily Attendance Rosters	W		8	YES
Daily Roster Lockup Sheets	W		8	YES
Daily Shift Roster (where employee worked)	W		8	
Fire Equipment & Inspection Report	W		8	YES
Inmate Files	N	WI STAT 59.27(9) & 16.61(3)(b)	8	YES
Inmate Property Release Form	W		8	YES
Jail Bank Account	W		8	
Jail Kitchen Menu	W		8	YES
Jail Kitchen Operating Reports	W		8	

Jefferson County Records Retention Schedule				
Department: Sheriff				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Jail Inmate Roster	W		C	YES
Law Suits and Complaints	W		8	
Monthly Equipment Check	W		8	YES
Municipal Billings	W		8	
Shift Logs	W		8	YES
Strip Search Log	W		8	YES
Visitor Logs	W	WI Adim. Code DOC 348.09 (4)	8	YES
Medical				
Medical Clinic Appointment Sheet	W		8	YES
Medical Infection Control Logs	W	WI Adm. Code DOC. 350.21(1)	C	YES
Medical Inmate Sick Call Lists and Reports	W	WI Adm. Code Doc. 350.21 (1)	C	YES
Inmate Medical Records	W	WI Stats 146.81 to 146.83 and WI Adm. Code Doc.350.09(3)	EVT+8	YES
Medical Screening Records (Booking Sheets)	W	WI Adim. Code DOC. 350.18	EVT+8	YES
Patrol Division				
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

Jefferson County Records Retention Schedule				
Department: Sheriff				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
<i>Records</i>				
Accident Reports	W		8	YES
Accident Reports, Non-Reportable	W		8	YES
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	
Incident Reports	W		P	YES
Injunctions	W		8	YES
Intoxallizer Ricertification	W		S	YES
Money Transfer Log, Front Desk	W		8	YES
Operating While Under the Influence (OW) Report	W		8	YES
Orders to Produce (Writs)	W		8	YES
Patrol Roster	W		2	YES
Radar Certification Logs	W		LOP	YES
Registration of County Vehicles	W		LOP	
Restraining Orders	W		8	YES
State Uniform Crime Report	W		P	YES
Traffic Fatalities	W		8	YES

Jefferson County Records Retention Schedule				
Department: Sheriff				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Warning Notices	W		EVT+ 6 mos.	YES
Historical Society Codes N = Notify W = Waived NA = Not Applicable		Retention Codes		
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	
		EOY = End of Year	V = Vital	

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Jefferson County Records Retention Schedule				
Department: Treasurer				
Record Title	State Code	Authority	Retention Years - Plus Current Year	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
Investment Proposals	W		3	
Investment Reports	W		7	YES
NSF (Non-Sufficient Funds) Check	W		7	YES
Plat Books	N		S	YES
Probate Fees Report	W		7	YES
Real Estate Transfer Fees	W		7	YES
Receipts, General	W	WI Stats 59.52(4)(a)(15)	7	YES
Sale Book	W		15	YES
Settlement, Receipts and Related Documents	W	WI Stats 59.52(4)(a)(14)	15	YES

Jefferson County Records Retention Schedule				
Department: Treasurer				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Stop Payment	W		7	YES
Tax Apportionment	W	WI Stats 59.52(4)(a)(1,2)	3	YES
Tax Receipts/Bills	W	WI Stats 59.52(4)(a)(14)	15	YES
Tax Rolls	N	WI Stats 59.52(4)(b)(2) & 59.52(4)(c)(2)	15	
Wire Transfer Statements	W		7	YES
Historical Society Codes		Retention Codes		
N = Notify W = Waived NA = Not Applicable		AA = After Audit	EVT = Event Date	
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Jefferson County Records Retention Schedule				
Department: UW-Extension				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
4-H Committee Minutes			7	YES
4-H Enrollment Forms			y	YES
4-H Leaders Association Financial Records			7	YES
4-H Leaders Association Minutes			7	YES
4-H Name and Emblem Report			7	
Annual Report - Department			4	
Camp/Trip Medical/Health Histories			7	YES
Civil Rights Forms/Reports/Files			7	YES
Club/Committee Information			7	YES
Criminal Records Checks			C	YES
ES-237 (Annual Federal Statistical Report)			7	YES
Extension Education Committee Minutes			7	
Licenses - Software			LOP	YES
Mailing Lists			C	YES
Maintenance Agreement (Copier)			LOP	YES
Room Use Schedules			3	
Tractor Safety Participant Registries/Enrollments			Until Participant is 14 Years Old	YES
Volunteer Application Forms			Leader Ceases Involvement + 7	YES

Jefferson County Records Retention Schedule				
Department: Veteran's Services				
Record Title	State Code	Authority	Retention Years - Plus Current 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		
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IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).				

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Jefferson County Records Retention Schedule				
Department: Zoning & Planning				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Agriculture Land Preservation Plan	N		S	YES
Amendments to the Waukesha County Development Plan			P	YES
Conditional Use Files	N/A		P	YES
Farmland Preservation Certificates		WI. Stat. 91	P	YES
FEMA Flood Evaluation Certificates			P	YES
Floodplain Ordinance			S	YES
Floodplain Substantial Damage			P	YES
Land Use Permit Files			P	YES
Private Sewage Systems			P	YES
Private Sewage System Maintenance		COMM 83	P	YES
Private Sewage System Ordinance				
Soil Test			P	YES
Subdivision Review	N/A		P	YES
Subdivision & Land Ordinance			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		
		AS = After Settlement LOP = Life of Product		
		AT = After Termination M = Months		
		C = Current Only P = Permanent		
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<p>IMPORTANT NOTE: The retention periods on this schedule apply to records stored on any medium (paper, electronically, digitally, microform, etc.).</p>				

Jefferson County Records Retention Schedule				
Department: UW-Extension				
Record Title	State Code	Authority	Retention Years - Plus Current Year	Official Copy
Historical Society Codes N = Notify W = Waived NA = Not Applicable		Retention Codes		
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