

505C-TAX APPEALS COMM

Dept #: 401/ Department Name: TAX APPEALS COMM

RDA # RDA Title Retention Disposition PII

00001000. **TAX APPEALS CASES - DECISIONS AND RULINGS** **EVT+10** **SHSW** **Y**

THESE ARE CASES FILED UNDER CHAPTER 73 OF THE WISCONSIN STATUTES AND CHAPTER TAX 1 OF THE WISCONSIN ADMINISTRATIVE CODE.

CASE FILES CONTAIN: COPY OF ANY HIGHER COURT DECISIONS; DECISION OR RULING OF THE COMMISSION, IF IN WRITING, AND AFFIDAVIT OF MAILING; BRIEFS OF THE PARTIES; ANY REQUIRED TRANSCRIPT OF TESTIMONY OF HEARING, THAT MAY CONTAIN AN ORAL DECISION; CALENDAR AND CERTIFIED MAIL RECEIPTS SCHEDULING THE CASE FOR HEARING; WRITTEN FACT STIPULATION; PRE-HEARING MEMORANDUMS; MOTIONS; DEPARTMENT OF REVENUE ANSWER TO PETITION FOR REVIEW; AND PETITION FOR REVIEW.

*EVENT = CLOSED AS DEFINED AS "AFTER ALL APPEAL PERIOD HAVE EXPIRED."

00002000. **TAX APPEALS CASES - DISMISSAL FILES** **EVT+3** **DEST** **Y**

THESE ARE CASES FILED UNDER CHAPTER 73 OF THE WISCONSIN STATUTES AND CHAPTER TAX 1 OF THE WISCONSIN ADMINISTRATIVE CODE.

THESE ARE CASES WHERE THE COMMISSION ENTERS A WRITTEN OR ORAL OF DISMISSAL. CASE FILES CONTAIN: PETITION FOR REVIEW; ANSWER OR MOTION BY DEPARTMENT OF REVENUE; CALENDAR AND CERTIFIED MAIL RETURN RECEIPTS SCHEDULING THE CASE FOR HEARING; PRE-HEARING MEMORANDUMS; WRITTEN STIPULATION, WITHDRAWAL OF PETITION, OR CANCELLATION OF ASSESSMENT; AND THE ORDER DISMISSING THE CASE.

DISMISSAL OCCURS WHEN EITHER PARTY NO LONGER CHOOSES TO PURSUE THE MATTER OF WHEN THE COMMISSION DISMISSES THE CASE ON GROUNDS OF FAILURE BY A PETITION TO TIMELY FILE A PETITION, APPEAR AT A COMMISSION HEARING, PROSECUTE A PETITION, OR COMPLY WITH AN ORDER OF THE COMMISSION.

*EVENT = CLOSED AS DEFINED AS "AFTER ALL APPEAL PERIODS HAVE EXPIRED."

00005000. **DOCKET PAGES** **EVT+3** **DEST** **Y**

THESE ARE DOCKET PAGES CREATED UNDER CHAPTER 73 OF THE WISCONSIN STATUTES AND CHAPTER TAX 1 OF THE WISCONSIN ADMINISTRATIVE CODE.

THESE ARE DOCKET PAGES CREATED WHEN A PETITION IS FILED AND ARE CHRONOLOGICALLY UPDATED UNTIL THE FINAL DISPOSITION OF A CASE, WHICH MAY INCLUDE HIGHER COURT ACTIONS. PRINTED DOCKET PAGES ARE RETAINED PERMANENTLY.

EVENT = CLOSED: DEFINED AS "AFTER ALL APPEAL PERIODS HAVE EXPIRED."

00006000. **NEW PETITIONS LIST: DISPOSITION LIST** **CR+1** **DEST** **Y**

THESE ARE LISTS CREATED UNDER CHAPTER 73 OF THE WISCONSIN STATUTES AND CHAPTER TAX 1 OF THE WISCONSIN ADMINISTRATIVE CODE.

THE NEW PETITIONS LSIT IS A LIST OF PETITIONS FILED DURING A MONTH. IT CONTAINS THE NAME OF A PETITIONER, WHETHER A PETITIONER HAS A REPRESENTATIVE, AND THE DOCKET NUMBER OF A CASE. THIS LIST IS ELECTRONICALLY UPDATED DURING THE MONTH, AND A FINAL MONTHLY LIST IS ELECTRONICALLY RETAINED FOR 1 YEAR.

THE DISPOSITION LIST IS A LIST OF PETITIONS DISPOSED OF DURING A MONTH. IT CONTAINS A DOCKET NUMBER, THE NAME OF A PETITIONER, THE TYPE OF DISPOSITION, AND THE DATE OF THE DISPOSITION. THIS LIST IS ELECTRONICALLY UPDATED DURING THE MONTH, AND A FINAL MONTHLY LIST IS ELECTRONICALLY RETAINED FOR 1 YEAR.

EVENT = CREATION + 1 YEAR AND DESTROY

00007000. **STATISTICS** **EVT+5** **DEST** **N**

THESE ARE FISCAL YEAR STATISTICAL LISTS CREATED UNDER CHAPTER 73 OF THE WISCONSIN STATUTES AND CHAPTER TAX 1 OF THE WISCONSIN ADMINISTRATIVE CODE.

THESE ARE STATISTICAL COMPILATIONS SHOWING: 1) THE STATUS OF CASES, COMPILED EVERY SIX MONTHS; 2) THE NUMBER OF PETITIONS RECEIVED AND DISPOSED OF, COMPILED MONTHLY AND ANNUALLY; AND 3) THE NUMBER OF PETITIONS RECEIVED AND DISPOSED OF BY TYPE OF APPEAL, COMPILED MONTHLY AND ANNUALLY. THESE LISTS ARE PRINTED WHEN COMPILATION IS COMPLETED.

EVENT = ENTERED INTO DATA SYSTEM.

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<u>00008000.</u>	<u>LIST OF PETITIONS</u>	<u>P</u>	<u>PERM</u>	<u>Y</u>
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THIS LIST (ALSO STORED IN MS ACCESS DATABASE) IS CREATED UNDER CHAPTER 73 OF THE WISCONSIN STATUTES AND CHAPTER TAX 1 OF THE WISCONSIN ADMINISTRATIVE CODE.

THIS IS A LIST OF PETITIONS FILED. THE LIST CONTAINS: THE NAME OF A PETITIONER; THE DATE A PETITION IS FILED; THE CITY OF A REPRESENTATIVE'S RESIDENCE; WHETHER A RESIDENCE IS IN OR OUT OF WISCONSIN; THE DOCKET NUMBER ASSIGNED TO THE PETITION; WHETHER THE PETITION IS A SMALL CLAIMS CASE; AND THE NAME OF THE ATTORNEY REPRESENTING THE DEPARTMENT OF REVENUE. THIS LIST IS UPDATED AND PRINTED MONTHLY. A FINAL YEARLY LIST IS PRINTED.

THIS LIST IS USED AS A REFERENCE GUIDE, TO PROVIDE ANSWERS TO INQUIRIES FROM THE PUBLIC AND DEPARTMENT OF REVENUE REGARDING CASES FILED SINCE 1939, THE YEAR THE COMMISSION'S PREDECESSOR (BOARD OF TAX APPEALS) WAS CREATED. NO OTHER LIST WITH THIS INFORMATION EXISTS, MAKING PERMANENT RETENTION NECESSARY.

RETENTION = PERMANENT