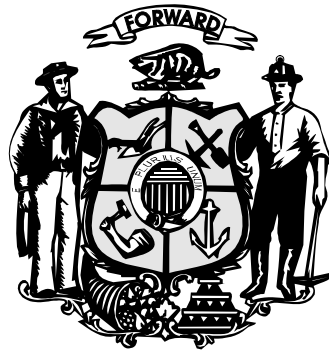


General Records Schedule

Administrative and Related Records

Approved by the Public Records Board:

March 21, 2022



Expiration: March 21, 2032

For use by all units of Wisconsin Government at the State, County, and Municipal level

I. Scope

This schedule governs the records retention obligations of state agencies pursuant to [Wis. Stat. § 16.61](#), and applies to “public records” as defined in [Wis. Stat. § 16.61\(2\)\(b\)](#). These “public records” are referred to as “records” in this schedule.

This schedule covers records which most state agencies, including the University of Wisconsin System Administration, the University of Wisconsin Institutions, all Wisconsin counties, municipalities and other units of local government create and use to administer administrative records. The schedule is applicable to administrative records regardless of format or media.

This schedule governs both administration and administrative related records. Records in this schedule pertain to both administration, higher-level position related records, and administrative, program management related records. Sections included in this schedule are: Position Related, Organization and Structure, Governance, Communication and Reporting, Program Records, Training and Events, and Operational.

This general schedule may *not* include records which are unique to the mission of a single government unit. Records that are unique to the mission of a specific government unit require a separate Records Disposition Authorization (RDA). The department or institution is responsible for creating a RDA that must be submitted to, and approved by, the [Public Records Board \(PRB\)](#).

See the [Introduction to General Records Schedules](#) for additional information about how to use this schedule. In particular please review the restrictions on conditions that might preclude the authorized destruction of documents in the normal course of business including open records requests, ongoing legal holds, or audits currently underway or known to be planned.

This schedule goes into effect upon final approval by the Public Records Board.

II. Records Format

Records covered in this schedule may be in paper, electronic, or other formats. Electronic format examples include those created or transmitted via e-mail, data contained in database systems, and tapes/cartridges. To safeguard the information contained in records maintained *exclusively* in electronic format, agencies must meet the standards and requirements for the management of electronic records outlined in [Wis. Admin. Code ch. Admin 12](#).

III. Personally Identifiable Information

Wisconsin law requires authorities to specifically identify certain record series within a general records schedule that contain Personally Identifiable Information (PII). [Wisconsin Stat. § 19.62\(5\)](#) defines PII broadly as “information that can be associated with a particular individual through one or more identifiers or other information or circumstances.” Despite this broad definition, [Wis. Stat. § 16.61\(3\)\(u\)\(2\)](#), requires that record series within a schedule containing the following types of PII need not be identified as such: a) the results of certain computer matching programs; b) mailing lists; c) telephone or e-mail directories; d) record series pertaining exclusively

to agency employees; and e) record series that contains PII incidental to the primary purpose for which the records series was created, and f) those relating to state agency procurement or budgeting. If in doubt as to whether a specific record series contains PII, check with your agency legal counsel.

IV. Confidentiality of Records

Most records are not confidential and are open to public disclosure, however, there are exceptions. This GRS will identify any record series that may contain information required by law to be kept confidential or specifically required to be protected from public access, identifying the state or federal statute, administrative rule, or other legal authority that so requires. If in doubt as to whether or not a specific record, or content in that record, is confidential, check with your agency legal counsel. A record series should be identified as confidential even if not all records in the series contain confidential information and not all parts of records covered by the series are confidential.

V. Superseded Record Series

“Superseded” means that a new record series or RDA number has been used to cover records that were previously identified differently. The last column in the following GRS table titled “Previous RDA Number (if applicable)” provides a cross walk between new and any superseded RDA numbers. When revising a GRS, an attempt is made to retain the previous RDA number, providing the underlying records remain the same.

VI. Related Records

The “Related Records Series” section provides information on other record series in approved GRSs which may relate to the broader functional area of this GRS. These record series are listed to facilitate a more complete understanding of all the record series within the broad scope of this function of government. It may not however contain a complete listing of all records series used within your agency for these types of business records. See the “Related Records Series” section included in this document.

VII. Closed Record Series

When revising a GRS it is common for some previously included record series to be closed. The “Closed Series” section lists series containing records that are no longer created, nor are they expected to be in the future. See the “Closed Series” section included in this document.

VIII. Revision History

See the “Revision History” section for a listing of changes to this GRS.

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
Position Related - Appointed Staff or Equivalent may include, but are not limited to, Agency Head, Deputy, Executive Assistant, Division Administrators, Regional Directors, Chancellors, Vice Chancellors, Provost, Vice-Provosts, and elected local officials.								
ADMIN200	Business Records - Appointed Staff or Equivalent Positions	Business-related correspondence, files, calendars and records of appointed staff or equivalent.	Yes	Follow agency specific statutory citations.	EVT + 3 years and transfer to Wisconsin Historical Society or UW Archives.	Event is date of separation from position.		ADM00004 ADM00009 ADM00030
ADMIN201	Business Records - Non-Appointed Staff	Business-related correspondence, files, calendars and records of non-appointed staff or equivalent.	Yes	Follow agency specific statutory citations.	CR + 1 year and destroy confidential.	Event is date of creation.	Pertains to records where the content is not managed by another RDA.	ADM00005 ADM00010
ADMIN202	Transition Briefings – Appointed Staff or Equivalent Positions	Records prepared to provide an overview of the organization during transitions from outgoing management to incoming management.	No	No	EVT + 2 years and destroy.	Event is date outgoing employee separates from their position.	Description of projects being worked on. Contacts. List of files in share drives / file cabinets that are central to the position.	ADM00021
ADMIN203	Transition Briefings – Non-Appointed Staff	Records prepared to provide an overview of a position during a transition from an outgoing employee to an incoming employee.	No	No	EVT +1 year and destroy.	Event is date new employee begins their position or decision made not to refill.	Description of projects being worked on. Contacts. List of files in share drives / file cabinets that are central to the position.	

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
Organization and Structure – Records relating to operational planning and functions including re-organizations and transfer of responsibility plans.								
ADMIN250	Organizational Planning Documentation	Strategic business and operational planning files. May include, but not limited to, final plan and supporting background documents.	No	No	EVT + 6 years and transfer to Wisconsin Historical Society or UW Archives.	Event is date plan is completed or superseded.	Strategic plans are typically prepared at the agency level. Business and operational plans are typically executed at the division and bureau level.	ADM00017
ADMIN251	Organizational Documentation – Bureaus, Divisions, Departments	Documentation of organizational changes or transfer of high-level administrative, functional or regulatory responsibilities. May include, but not limited to, reports explaining the changes, internal analysis of changes, new organizational charts or descriptions of roles and responsibilities.	Yes	No	EVT + 2 years and transfer to Wisconsin Historical Society or UW Archives.	Event is date change is completed.		ADM00018 ADM00019
ADMIN252	Organizational Documentation – Sections and Work Units	Documentation of organizational changes or transfer of administrative, functional or regulatory, responsibilities at the section or work unit level. May include, but not limited to, reports explaining the changes, internal analysis of changes, new organizational charts or descriptions of roles and responsibilities.	Yes	No	EVT + 2 years and destroy confidential.	Event is date change is completed.		ADM00020

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
Governance – High-level records typically related to statutory requirements.								
ADMIN300	Administrative Rules – Development and Background	Records used to develop and revise Administrative Rules including Emergency Rules. May include, but not limited to, background materials, rule drafts, code interpretations, summary of public comments from hearings, Legislative and agency comments, correspondence, fiscal estimates, orders and reports.	No	No	EVT + 10 years and transfer to Wisconsin Historical Society or UW Archives.	Event is the effective date or legislative objection date of each rule.	This series does not include the final approved rules which are maintained by the Legislature.	ADM00003
ADMIN301	Boards, Councils, or Commissions	Records associated with boards, councils, commissions, or their sub-committees, that are established by legislation or Governor's Executive Order. May include, but not limited to, member listings, appointment notifications, charter or project mandate, operating rules, roles and responsibilities, agendas, meeting notes and attached documentation, interim reports, presentations.	May include PII	May include Confidential Information	EVT + 5 years and transfer to Wisconsin Historical Society or UW Archives.	Event is date of meeting or approval of document.	Closed session materials may be confidential under Wis. Stat. § 19.85(1) . Materials must be identified as closed session – confidential.	ADM00025

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN302	Department Lobbyist and Lobbying Activities	Records used for filing lobbying time or expenditure and activity reports at the state level. May include, but not limited to, all accounts, bills, receipts, books, papers and other documents necessary to substantiate the expense statement, including records identifying the amount of time that is spent on lobbying each day as described by Wis. Stat. § 13.68(5) .	Yes	No	EVT + 3 years and destroy confidential.	Event is date of submittal of expense statement.		ADM00014
ADMIN303	Legal Notices	Includes legal notices required by law or by court order to be disseminated via methods as described by Wis. Stat. § 985.01(2) . May include, but not limited to, publication of laws, ordinances, resolutions, financial statement, budgets and proceedings intended to give notice in an area; notice of public hearings before a governmental body and notices of meetings of private and public bodies; notices and certificates of elections, and facsimile ballots; notices intended to inform the public that they may exercise a right within a designated period or by a designated date.	No	No	CR + 1 year and destroy.	Event is date of creation.		ADM00016

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN304	Memorandums of Understanding (MOU) & Service Level Agreements (SLA)	A MOU or SLA is typically used for coordination of administrative activities between entities who share a common function. May include, but not limited to, supporting documentation, correspondence setting the terms of the agreement or the final agreement itself.	No	No	EVT + 4 years and destroy.	Event is date agreement ends or is superseded.	Agreements between government units or a large government unit's separate divisions or bureaus who may share functions such as a help desk or the temporary interchange of a state employee.	ADM00029

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN305	Public Records Requests and Responses	<p>Records relating to requests for public records as specified under the provisions of Wis. Stat. §§ 19.35-19.37 and the Federal Freedom of Information Act (FOIA).</p> <p>Includes original request, notice of scope changes to the request, billing, collection of fees, acknowledgement of receipt of request, follow-up letters and transmittal memorandums, requests for extension, third-party notification, access request review recommendations and summaries, listing of records searched and used to respond to requests, and logs maintained documenting receipt and response of requests. May also include request response package including any redaction of information.</p> <p>Also includes abandoned or withdrawn requests.</p>	Yes	Yes Wis. Stat. § 19.35(1)	EVT + 3 years and destroy confidential.	Event is date response is provided or request is abandoned or withdrawn.	<p>If requests are denied, records covered here include request denials and related justification, mediation, representations from third parties, recommendations, court orders, and reviews.</p> <p>Does not include source records that are provided to fulfill the public records request. These must be held for a minimum of 90 days unless informed otherwise by the court according to Wis. Stat. § 19.35(5) and then resume their normal lifecycle under their specific records schedule.</p>	ADM00022
ADMIN306	Biennial or Annual Required Report Documentation	Supporting documents related to preparing the biennial or annual reports required by Wis. Stat. § 15.04 .	No	No	EVT + 4 years and destroy.	Event is date report submitted.	Does not include the completed reports and publications that must be distributed per Wis. Stat. § 35.83 to various libraries.	ADM00002

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
Communication and Reporting – Exchange of information inside and outside of a governmental unit.								
ADMIN350	Internal Communications	Records that document communication within an entity/unit between staff regarding its operations. These communications may be provided through a variety of methods such as, but not limited to, documents, photographs, audio, and video. Applies to the sender of the original record and not the recipient.	May contain PII	No	EVT + 3 years and destroy confidential.	Event is date disseminated.	Announcements, intranet articles and internal newsletters. Staff meeting materials.	ADM00015 ADM00024
ADMIN351	External Communications	Records that document communications regarding business services and information outside the entity/unit. These communications may be provided through a variety of methods such as, but not limited to, documents, photographs, audio, video, and social media. Applies to the sender of the original record and not the recipient.	No	No	EVT + 3 years and transfer to Wisconsin Historical Society or UW Archives.	Event is date disseminated.	Daily media logs, news/press releases, media advisories, op-ed columns and articles. Summaries of surveys or questionnaires.	

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN352	Transitory Records	<p>Records that are non-substantive, required only for a short time, have little or no documentary or evidential value, and are not required to meet legal or fiscal obligations.</p> <p>These records shall not be used to initiate, sustain, evaluate, or provide evidence of decision-making or public policy.</p> <p>Both of the statements/ conditions above must be met for the records to be considered transitory and applies regardless of the format of the record.</p>	May contain PII	May include Confidential Information	EVT + 0 years and destroy confidential.	Event is date when created or received.	<p>Alerts and notifications (e.g., check your email, meeting about to start).</p> <p>Messages confirming short term arrangements (e.g., taxi ready at 5 PM).</p> <p>Responses to routine requests (e.g., web-site address, contact information, site location, publications)</p> <p>Not all texts or emails are transitory.</p>	ADM00011
ADMIN353	External Complaints	Records of complaints from the public regarding issues not related to a specific program and are not otherwise regulated by state or federal requirements.	Yes	No	EVT + 2 years and destroy confidential.	Event is date of complaint resolution, dismissal or end of litigation.	Complaints related to a specific program would be filed with those records.	ADM00007
ADMIN354	Activity and Production Reports	Reports by individuals, offices or teams that document the business of the unit of government. May include, but not limited to, progress reports, workload reports, status of work assignments, backlog or production reports, and ad hoc reports.	No	No	CR + 1 year and destroy.	Event is date of creation.		ADM00001

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN355	Status Reports	Reports that document and report on the business functions of the division and its supporting bureaus. These reports are often prepared for the department or agency head, or an equivalent position. May include, but not limited to, accomplishments, goals, statistics, awards received, anticipated program needs and plans, as well as any supplementary documentation to support such reports.	No	No	EVT + 3 years and transfer to Wisconsin Historical Society or UW Archives	Event is date report is submitted.		ADM0001A
ADMIN356	Staff Biographies	Biographies of appointed or equivalent staff and staff whose work has wide-reaching local, state or international impacts. May include, but not limited to, biographical information, headshots, and materials describing their body of work.	Yes	No	EVT + 3 years and transfer to Wisconsin Historical Society or UW Archives.	Event is date of separation from position.	Curriculum Vitae (CVs) Descriptions of research or projects and their impacts. Lists of authored publications or articles. Awards or commendations.	ADM00028

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
Program Records – Business records evidencing how a program functions and the services it provides.								
ADMIN400	Policies and Procedures	<p>Policies and procedures designed to help employees perform their duties and navigate their department or government unit. May include, but are not limited to, manuals, manual codes, handbooks, and administrative practices.</p> <p>Procedures under this RDA have typically gone through a vetting process and are intended to support policies in a direct manner.</p>	No	No	EVT + 7 years and destroy.	Event is date policy or procedure is superseded or obsolete.		ADM00023

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN401	Policies and Procedures – Historically Significant	<p>Policies and procedures which have government unit or enterprise-wide broad or long-term, significant impact.</p> <p>These records reflect new policies / procedures or changes to existing policies / procedures that impact employees, or the services provided.</p> <p>These policies and procedures must meet at least one of the following:</p> <ul style="list-style-type: none"> • Establish precedent and have a broad impact that significantly impacts employees, citizens or the services provided. • Be recognized for its uniqueness by established outside peers or authorities. • Receive widespread attention from the news media. 	No	No	EVT + 7 years and transfer to Wisconsin Historical Society or UW Archives.	Event is date policy or procedure is superseded or obsolete.	<p>Executive Directives</p> <p>Communications explaining the new change.</p> <p>Reports or analysis supporting the change.</p> <p>Impacts analysis of the policy or procedure.</p>	

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN402	Project Records	<p>Records documenting approved projects with internal impact.</p> <p>The team's work may include, but is not limited to:</p> <ul style="list-style-type: none"> • An exploratory analysis of an issue • Addressing an internal issue that does not have a wide-reaching impact. <p>May also include, but not limited to, meeting agendas and minutes, correspondence, project reports, member lists and responsibilities.</p> <p>May be associated with a workgroup, team, a non-statutorily established committee or similar.</p>	No	No	EVT + 5 years and destroy.	Event is date of project completion.	<p>Training and outreach specific to the project.</p> <p>Project plans and schedules.</p> <p>This schedule does not include IT or facilities projects which have their own record schedule.</p> <p>Records in this series may not be as robust as information contained in a standard project management plan due to its more limited nature.</p>	ADM00027

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN403	Project Records – Historically Significant	<p>Records documenting approved government unit or enterprise-wide projects with broad impact.</p> <p>These projects must meet at least one of the following:</p> <ul style="list-style-type: none"> • Establish precedent and have a broad impact that significantly impacts employees, citizens or the services provided. • Be recognized for its uniqueness by established outside peers or authorities. • Receive widespread attention from the news media. <p>May include, but not limited to, meeting agendas and minutes, correspondence, project reports, member lists and responsibilities.</p> <p>May be associated with a task force, workgroup, team, a non-statutorily established committee or similar.</p>	No	No	EVT + 5 years and transfer to Wisconsin Historical Society or UW Archives.	Event is date of project completion.	<p>Project charter, plan or schedule.</p> <p>Project requirements, specifications, evaluations, and summaries.</p> <p>Training and outreach specific to the project.</p> <p>This schedule does not include IT or facilities projects which have their own records schedule.</p> <p>Records in this series consists of information typically contained in a standard project management plan.</p>	ADM00026

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN404	Project Records – Not Completed	Records documenting unit or enterprise-wide projects that were not completed. May include, but not limited to, meeting agendas and minutes, correspondence, project reports, member lists and responsibilities.	No	No	EVT + 3 years and destroy.	Event is date project was denied or date of last activity.	<p>Project charter, plan or schedule.</p> <p>Project requirements, specifications, evaluations and summaries.</p> <p>Training and outreach specific to the project.</p> <p>This schedule does not include IT or facilities projects which have their own records schedule.</p>	
ADMIN405	Entity Subject Records	<p>Records which document the activities of an entity/unit and are typically arranged by topic or subject.</p> <p>These records do not belong to a specific individual but are held at the highest level in a program area.</p>	No	No	EVT + 5 years and transfer to Wisconsin Historical Society or UW Archives.	Event is date obsolete or superseded.		

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN406	Grants	Grant records and supporting documentation where the government unit is the grant recipient or issuer. May include, but are not limited to, records that are submitted material for the grant application or review process, or documents related to the receipt and expenditure of grant funds or the grant denial.	May include PII	May include Confidential Information	EVT + 4 years and destroy confidential.	Event is date of final report or denial is received / sent.	Grant proposals and letters of support. Notification of award or denial of grant funds. Contracts and agreements. Grant status, narrative reports.	ADM00013
Training and Events								
ADMIN450	Charity Campaigns	Charity campaign records which may include, but are not limited to, committee meeting minutes/agendas, flyers, announcements, and campaign events. Applies to the sender of the original record and not the recipient.	No	No	EVT + 2 years and destroy.	Event is date of campaign is completed.	Charity campaigns such as Partners in Giving. Clothing and school supply drives. Does not include deduction request forms which will be found in the Payroll GRS.	ADM00006

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN451	Events – Planning and Preparation	<p>Records related to the planning, preparation and administrative activities of special events such as conferences, forums, special programs, performances, and similar. May include, but not limited to, mailing lists, RSVP tracking, attendee lists, seating charts, contracts, room reservations and logistical information, signage and event correspondence, evaluation forms, travel and speaker arrangements.</p> <p>Events may be hosted at state facilities or sponsored by a unit at a non-state facility.</p>	Yes	No	EVT + 3 years and destroy confidential.	Event is date event occurs.	All invoices related to events should be retained per the appropriate Fiscal and Accounting General Records Schedule.	
ADMIN452	Events – Publicity and Proceedings	<p>Records related to the publicity and proceedings of special events such as conferences, forums, special programs, performances, and similar. May include, but is not limited to, materials created to advertise the event, items distributed to attendees and details about the event itself.</p> <p>Events may be hosted at state facilities or sponsored by a unit at a non-state facility.</p>	Yes	No	EVT + 3 years and transfer to Wisconsin Historical Society or UW Archives.	Event is date event occurs.	<p>Announcements, flyers and speaker biographies.</p> <p>Programs, schedules, and handouts or materials distributed to attendees.</p> <p>Photographs and audio or video recordings.</p> <p>Texts of speeches presented.</p>	

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN453	Training Course Materials	Materials prepared and used by staff to provide routine training targeted to internal and external audiences. Records may include, but not limited to, presentations, handouts and other materials.	No	No	EVT + 3 months and destroy.	Event is date materials are superseded or obsolete.	Basic skill development. Records management, operational or functional training. Training related to licensure or certifications must be retained under a program-specific RDA.	ADM00012
Operational – Records commonly associated with day-to-day operations.								
ADMIN500	Forms Catalog / Listing	List of blank forms available.	No	No	EVT + 0 years and destroy.	Event is date catalog or list is superseded or obsolete.	Document Sales product list	ADM00104
ADMIN501	Forms Change Request Files	Includes development information, change requests received from users, printing specifications and orders, format samples of each approved version and sponsor/program manager approvals.	No	No	EVT + 6 months and destroy.	Event is date form is approved for use.		ADM00101
ADMIN502	Forms History Files	A history of authorized final forms created and assigned an official identification number. May include, but not limited to, order sheets, and product history reports.	No	No	EVT + 5 years and destroy.	Event is date form is obsolete.	Completed forms are covered by a program specific RDA.	ADM00100
ADMIN503	Forms Request Orders	Records used to fill requests for blank forms. May include, but not limited to, inventory location and active orders reports.	No	No	EVT + 1 month and destroy.	Event is date request filled.		ADM00103

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN504	Library Catalog / Listing	List of library materials held by a government library.	No	No	EVT + 0 years and destroy.	Event is date catalog or list is superseded.	Public libraries and/or public library systems should use Wisconsin's Public Libraries and Public Library Systems and Related Records General Records Schedule. School libraries should use the Wisconsin School District General Records Schedule.	ADM00111
ADMIN505	Library Circulation or Loan Reports	Records documenting the use of government library materials.	May include PII	May be confidential per Wis. Stat. § 43.30 depending on library designation or circulation system.	EVT + 0 and destroy confidential.	Event is date materials are returned and/or fines are paid.	Public libraries and/or public library systems should use Wisconsin's Public Libraries and Public Library Systems and Related Records General Records Schedule. School libraries should use the Wisconsin School District General Records Schedule.	ADM00112
ADMIN506	Mailing Address Lists and Updates	Lists used to send mailings or mail materials to subscribers or regular recipients. Also includes changes used to update address records. May include, but not limited to, USPS, inter departmental mail, and email lists.	No, exempt under Wis. Stat. § 16.61 (3)(u).	No	EVT + 0 years and destroy.	Event is date list is superseded or obsolete.	USPS address change cards. Reports generated from move update software.	ADM00122 ADM00123

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN507	Mail and Messenger Service Distribution and Routing Plans, Schedules, and Lists	Service delivery and pickup routes, schedules, and distribution lists used to administer mail and messenger services such as route diagrams, schedules or charts.	No	No	EVT + 0 years and destroy.	Event is date superseded or discontinued.		ADM00121
ADMIN508	Mail Pickup and Delivery Records	Records that document that mail and messages were picked up and delivered. May include, but not limited to, mail and fax logs, certified or registered mail receipt forms, signed pickup and delivery receipts, delivery and pickup route lists, and spreadsheets.	Yes	No	CR + 1 year and destroy confidential.	Event is date of creation.	<p>These records may be required as evidence in public records cases alleging that the government unit did not respond in a timely manner to inquiries or requests for service by the public.</p> <p>Does not include records specifically required as evidence of the execution of a contract, timely receipt of bids, or compliance with a specific statute or regulation.</p>	ADM00120

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN509	Records Inventory	<p>Descriptive reports of inventory for in-house and offsite records storage.</p> <p>Inventory reports may contain information indicating titles, record series, contents, locations, volume, inclusive dates, RDA (Record Retention/Disposition Authorization) numbers, and other attributes of those records. The inventory is used for staff reference to ensure compliance with retention requirements, and to run reports for audit(s) or risk management purposes.</p>	No	No	EVT + 10 years and destroy.	Event is date superseded.	<p>Internal inventories of records maintained.</p> <p>Inventory reports from the State Records Center or other storage vendors.</p> <p>For inventory stored at the State Records Center (SRC) or Other State Owned, Off-Site Storage Facility. The SRC or other state-owned storage facility is responsible for the official record.</p> <p>For inventory stored at a Non-State Owned, Off-Site Storage Facility and On-Site at Government Unit Storage. The government unit is responsible for the official record.</p>	ADM00130

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN510	Records Inventory Disposition Files	Records documenting authorized / approved destruction of records or transfer to an archival repository. May include, but not limited to, destruction request and approval forms, State Records Center annual and mid-year disposition files/reports, purge lists, transfer to archives eligibility, and related correspondence.	No	No	CR + 25 years and destroy.	Event is date of creation.	<p>For inventory stored at the State Records Center (SRC) or Other State Owned, Off-Site Storage Facility, the SRC or other state-owned storage facility is responsible for the official record.</p> <p>For inventory stored at a Non-State Owned, Off-Site Storage Facility or On-Site by a Government Unit, the government unit is responsible for the official record.</p> <p>These records are retained to document the legal disposition of records in case of discovery actions during litigation or when requested for use in audits.</p>	ADM00133

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN511	Records Storage/Transfer Files	Records used to transfer and retrieve inventory to and from inactive storage, and to maintain control while in storage. May include, but not limited to, records tracking missing files, boxes, or electronic media. Also, may include retrieval requests, transfer forms or lists, internal storage requests, and charge out slips or logs.	No	No	CR + 3 years and destroy.	Event is date of creation.	<p>For inventory stored at the State Records Center (SRC) or Other State Owned, Off-Site Storage Facility, the SRC or other state-owned storage facility is responsible for the official record.</p> <p>For inventory stored at a Non-State Owned, Off-Site Storage Facility or On-Site by a Government Unit, the government unit is responsible for the official record.</p>	ADM00134
ADMIN512	Records Retention Disposition Authorizations (RDA) Index	Internal index used to track RDAs.	No	No	EVT + 10 years and destroy.	Event is date index is superseded.		ADM00132

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN513	Records Retention Disposition Authorizations (RDA) – Government Unit Official Record	<p>Records Retention Disposition Authorizations (RDAs) approved by the Wisconsin Public Records Board (PRB).</p> <p>This is the agency, campus, or other government unit official record.</p> <p>RDAs must be retained to document compliance with State records management laws and regulations and as the authority to retain and/or dispose of records specified in such policies.</p>	No	No	EVT + 20 years and destroy.	Event is date closed or superseded.		ADM0131A
ADMIN514	Records Retention Disposition Authorizations (RDA) – PRB Official Record	<p>Records Retention Disposition Authorizations (RDAs) approved by the Wisconsin Public Records Board (PRB).</p> <p>This is the PRB official record, which is maintained by the PRB Executive Secretary.</p>	No	No	EVT + 100 years and destroy.	Event is date closed or superseded.	Agencies and governmental units are provided with a signed version of their approved RDAs which are retained by them according to ADMIN513.	ADM00131

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
ADMIN515	Records Management Program	<p>Records used to support the administration of a records management program.</p> <p>May include, but not limited to, correspondence and memoranda, copies of laws, regulations, and other related retention and disposition requirements and documentation compiled to support a records management program.</p> <p>This documentation may be used to draft, amend, or renew a Records Retention Disposition Authorization (RDA). May also include supporting legal information for citations contained in an RDA.</p>	No	No	EVT + 10 years and destroy.	Event is date document no longer needed or RDA is approved.	<p>Tracking or guidance documents.</p> <p>Surveys and studies.</p> <p>Records management related articles, vendor literature, management plans.</p>	ADM00135

Closed Series

A closed series contains records that are no longer created, nor are they expected to be in the future.

RDA Number	Record Series Title	Minimum Retention and Disposition	Rationale
ADM00110	Interlibrary Loan Files	EVT+3 years and destroy	No longer created or received.

Related Records Series

Information on other record series in approved GRSs which may relate to the broader functional area of this GRS. These record series are listed to facilitate a more complete understanding of all the record series within the broad scope of this function of government. It may not however contain a complete listing of all records series used within your agency for these types of business records.

RDA Number	Record Series Title	Description	Notes/Comments

Revision History

A listing of changes to this GRS.

Revision Date	RDA Number	Record Series Title	Revision Made
3/21/2022	ADM00102	Forms Inventory Records	Superseded by FIS00050