Records Management Resources

This resource guide pertains to resources for day-to-day records management discussed in Wis. Stat. § 16.61 primarily.

Records are retained in Wisconsin for not only historical preservation but to ensure operations records are available and transparent to the public under the public records law requirements of Wis. Stat. § 19.35. Additional local unit records management specifics can be found in Wis. Stat. § 19.21. For open meetings, public records requests, and local unit records management see the links below in the Additional Resources section.

Public Records Board (PRB)

This site is where records managers at all levels of State government find answers about statutory requirements and processes prescribed by the PRB. The PRB has oversight and accountability for the State's Records Program. The Board conducts its work through collaboration with Wisconsin governmental entities to assist in their compliance with the records retention and preservation requirements under Wis. Stat. § 16.61.

https://publicrecordsboard.wi.gov/Pages/home.aspx

Meetings	Annual Schedule
	Records Management Committee
	Operations & Training Advisory Committee
	Policy & Governance Committee
Records Resources	Board Policies
	Guidance & Best Practices
	Training Materials
	Counties & Municipalities
	PRB Forms
	Additional Resources
General Schedules	Introduction to General Records Schedules
	Statewide General Records Schedules
	Local Unit General Records Schedules
	General Records Schedule Policy & FAQ
	General Records Schedule Adoption Form
Agency Schedules	State Agency RDAs
	What is an RDA?
	How to Search an RDA List
	RDA Report Terminology

Records Management Resources

<u>Wisconsin Historical Society</u>

This site is where records managers of all levels go for questions about the preservation of records, the repository for publications, and electronic records management. The State Archives and Wisconsin Government Publications programs collect, catalog, and make available records and publications of permanent value created by Wisconsin state agencies and local units of government.

https://www.wisconsinhistory.org/Records/Article/CS15415

State Agency Records	How to Transfer State Agency Records to the State Archives Access to Wisconsin State Agency Records Collection Development for State Agency Records
Electronic Records	Manage Electronic Records Transferring Electronic Records to the State Archives Digitization Guidance NHPRC Electronic Records Grant
Government Publications	Federal Government Publications Wisconsin Government Publications Wisconsin County Publications
Local Government Records	How to notify the Historical Society on the destruction of obsolete records How to access local records that have been transferred to the State Archives

<u>State Records Center (SRC)</u>

This site is where Records Officers, Records Coordinators, and other clients find answers to day-to-day operational questions. The SRC is a secure, low-cost facility that offers State agencies and local units of government off-site control over semi-active and inactive records. The SRC's primary function is to serve agency needs for records maintenance, security and disposition. Below are the website sections and topics they cover.

https://doa.wi.gov/Pages/StateEmployees/StateRecordsCenter.aspx

Contacts & Hours	Office & Dock Hours Customer Service Desk Contacts
Inventory & Orders	Link to the inventory management website PowerPoint instructions on Submitting New Inventory and Searching and Requesting Inventory
Fact Sheets	Topics include: Destruction of Paper and Non-paper Media; How To Order Records Center Boxes; Management of Inactive Agency Personnel Files; Managing Confidential Records
Related Links	Agency Records Officer List Administrative Rule 12 Guidance Document Vital Records – Birth, Death, Marriage and Divorce Records

Records Management Resources

Records Management Classes

- Records 101
- Inventory Maintenance
- Records Coordinator
- SRC Processes & How-to

Course information can be found in Cornerstone. Cornerstone is an electronic learning management system used to assist with class registration and communication.

If you are not with a state agency that already uses Cornerstone for training, you will need to create an account using the link provided below for external users. In Cornerstone you will find full course descriptions, available sessions and registration information. Classes are open to all State and local unit employees.

External user Cornerstone link.

Additional Resources:

- League of Wisconsin Municipalities: https://www.lwm-info.org/ (for Villages and Cities)
- Wisconsin Towns Association: https://www.wisctowns.com/ (for Towns)
- Wisconsin Counties Association: https://www.wicounties.org/ (for Counties)
- Wisconsin Department of Justice – Open Meetings Law & Public Records Law Compliance Guides: https://www.doj.state.wi.us/office-open-government/office-open-government
- Local Government Services Bureau: (Municipalities are required under 19.21(4)(a) to get permission from Department of Revenue (DOR) before destroying any assessment rolls with forest crop acreage (FCA). This is the section in DOR that local units need to contact. Once they have approval to dispose of any FCA assessments then they notify WHS.) https://www.revenue.wi.gov/Pages/Contact/slfblfa.aspx